MISSOURI TOOLBOX 2.0
DESK AID

Career Assistance Program (CAP)
Procedure Manual

Table of Content

(In)Active Case Management …………………………………………………………………4
Active Case Management………………………………………………………..….4
(In)Active Case Management……………………………………………………4
(Un)Restrict Records……………………………………………………………………..5
Restrict Records…………………………………………………………………..5
(Un)Restrict Records……………………………………………………………..5
Agent Hats………………………………………………………………………………..6
Changing Hats……………………………………………………………………6
Alerts………………………………………………..……………………………………7
Issuing Manual Recipient Alerts…………………………………………………7
Issuing Manual Applicant (Good Cause) Alerts…………………………………9
Deleting Alerts from 'Daily Referrals Query'…………………………………..11
Deleting Alerts from 'Seeker Services Tab'……………………………………..12
Assessment………………………………………………………………………………...14
Work History……………………….……………………………………………15
Teen Parent in an Educational Activity…………………………………………15
Case Management Search…………………………..…………………………………...17
Search of Active CAP Clients by Counselor………………….…………………17
Search of CAP Recipients or Applicants………………..……………………...18
Sorting Data Results……………………………………………………….…...19
Reassigning a Primary Counselor……………………………………….……...21
Case Management Transfer Clerk…………………………………………….…...22
Different Type of Case Transfer Clerks…………………………………………22
Transferring a Case to Another Office……………………………………………23
Retrieving a Case from Another Office……………………………………………25
Reassigning a Case from Another Office…………………………………………29
Reassigning a Task to Another Counselor…………………………………...34
Case Notes…………………………………………………………………………………39
Entering/Adding a Case Note…………………………………………………...39
Deleting a Case Note……………………………………………………………41
Editing a Case Note……………………………………………………………..43
Employment Plan…………………………………………………………………..….46
Printing the Employment Plan…………………………………………………..46
Enrollment…………………………………………………………………………………47
Enrolling a Client into CAP……………………………………………………..47
FSD Load Information Tab………………………………………………………………49
FSD TANF Participation Tab……………………………………………………………50
FSD TANF Participation Tab……………………………………………………50
AWEP/CWEP, Community Service, and Core/Non-Core Hours………………………...52
Generic O*Net Code……………………………………………………………………..53
Immediate Engagement (IE)……………………………………………………………..55
Letters………………………………………………………………………………………57
Issuing Call-In Letters…………………………………………………………...57
Reviewing Call-In Letters………………………………………………………..59

Editing/Resending Call-In Letters……………………………………………………………61
Deleting Call-In Letters……………………………………………………….……..63
Free Form Letters…………………………………………………………...……..66
Issuing Post-Enrollment Letters…………………………………………….……...67
Reviewing Post-Enrollment Letters…………………………..…………………………68
Deleting Post-Enrollment Letters……………………..………………………………71
MQ Search………………………………………………………………………………….74
Office Locations…………………………………………………………………………….77
Changing Office Location Log In……………………………………………………..77
Seeker……………………………………………………………………………………….78
Searching for a Record……………………………………………………………..78
Entering Seeker Information………………………………………………………..80
Seeker Services Tab………………………………………………………………………...81
Services……………………………………………………………………………………..84
Entering Services into the Employment Plan………………………………………….84
Pre-Enrollment Conciliation Service…………………………………………………..87
Teen Parent………………………………………………………………………………….89
Identifying a Teen Parent……………………………………………………………..89
Sending a 'Teen Parent in an Educational Activity' Alert………………………………90
Sending a 'Teen Parent Not in an Educational Activity' Alert………………………….91
Transportation Related Expense (TRE) …………………………………………………….92
Authorizing Applicant TRE…………………………………………………………….92
Authorizing Recipient TRE…………………………………………………………….94
Two Parent…………………………………………………………………………………..96
Identifying a Two-Parent Household……………………………………………………96
Two-Parent Button……………………………………………………………………….96
*Entering the Default O*Net Code*……………………………………………………..98
Verification Screen…………………………………………………………………………99
Entering Actual Hours…………………………………………………………………100
Entering Projected Hours………………………………………………………………102
Entering Self-Employment Hours………………………………………………………104
Entering Excused Absences and Holiday Hours………………………………………….106
Work History………………………………………………………………………………...108
Entering a Work History………………………………………………………………..108
Sending 'Employment Obtained' Alert…………………………………………………109
Sending 'Verification of Termination' Alert……………………………………………111
Work Related Expense (WRE) ……………………………………………………………...112
Authorizing WRE Payments for Recipients……………………………………………..112
Reconciling WRE Payments……………………………………………………………115

Activate/Inactivate Case Management

Use this functionality to activate/inactivate records for case management purposes.

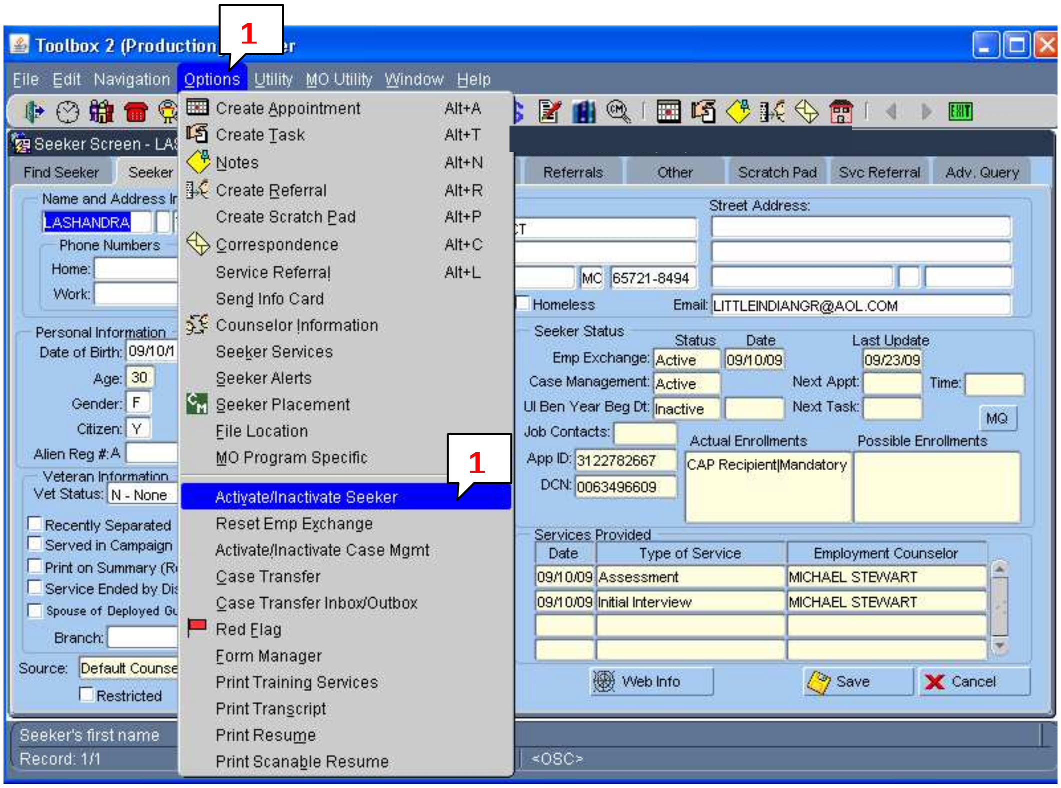


Figure 1: Options Menu/Activate-Inactivate Case Mgmt

Step-by-Step:

1. From the Options **Options** menu, select **<u>Activate/Inactivate Case Mgmt</u>**.

NOTE: This is an on/off feature. If activate Case Mgmt is selected, re-select to deactivate.

Restrict/Un-restrict Records

Use to restrict or un-restrict a record to comply with the “Domestic Violence” policy.

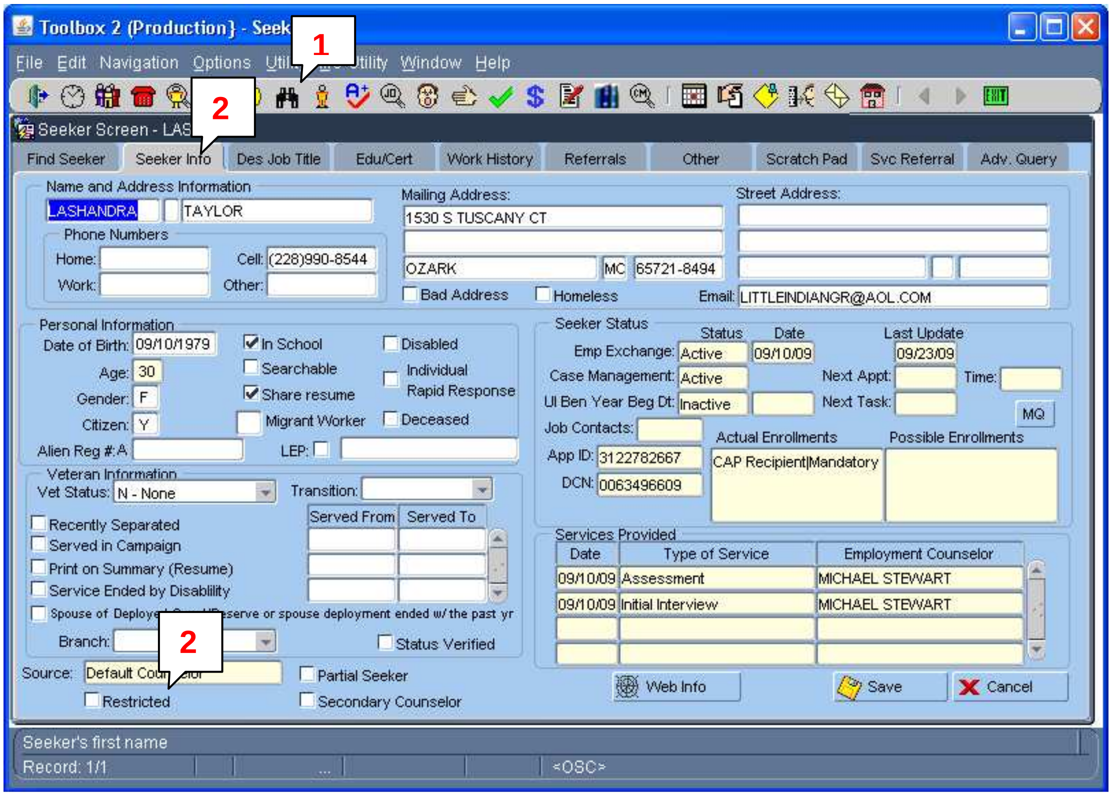


Figure 1: Find Seeker Module/Seeker Info Tab

Step-by-Step:

1. Click on **Find Seeker** icon.
2. On the **Seeker Info** tab, the **<u>Restricted</u>** field controls the Domestic Violence alert.
   - To ‘restrict’ the record, check the **<u>Restricted</u>** field.
   - To ‘un-restrict*’ the record, uncheck the **<u>Restricted</u>** field.

Note: When this field is checked or unchecked, an automatic alert is sent to notify FSD of the customer’s Domestic Violence status. For further clarification, refer to the “Applicant Alerts” or “Recipient Alerts” policy. Also, only certain staff has the Toolbox 2.0 capability to un-restrict records.

Agent Hats

Changing agent hats.

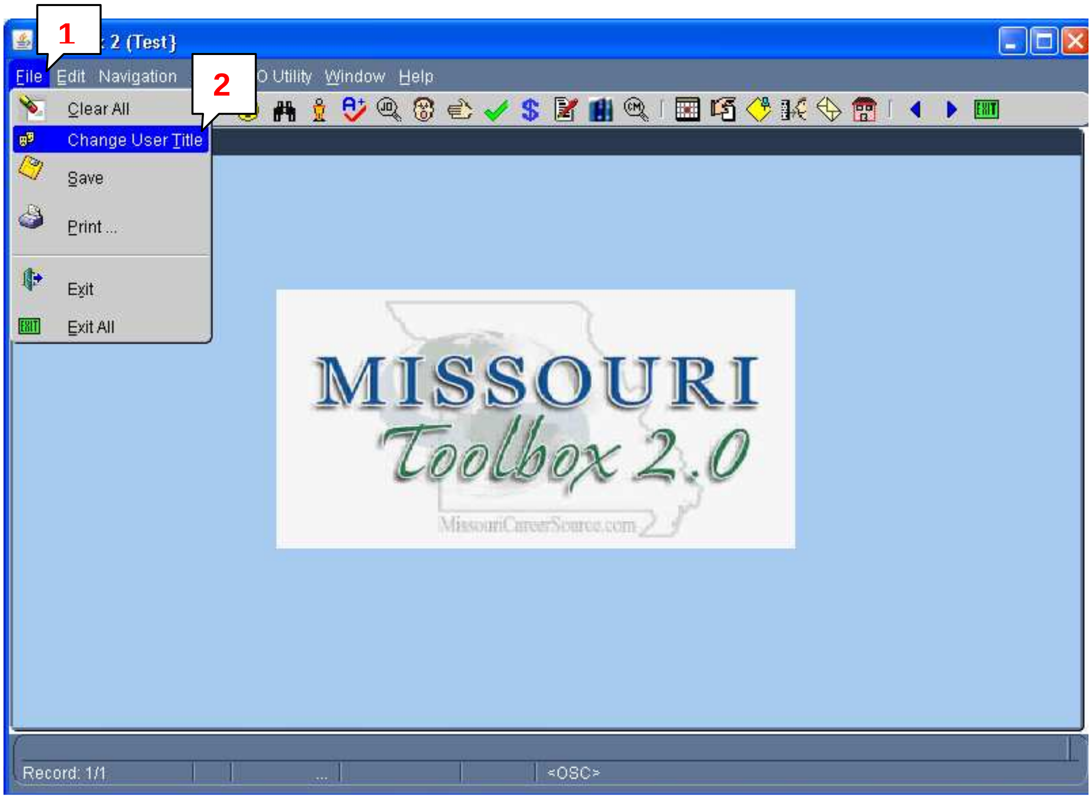


Figure 1: Splash Screen/File Menu/Change User Title Option

Step-by-Step:

1. While on the **Splash** screen, click on the **File** menu.
2. Select the **Change User Title** option. The **Change Agent Hat** screen will appear.

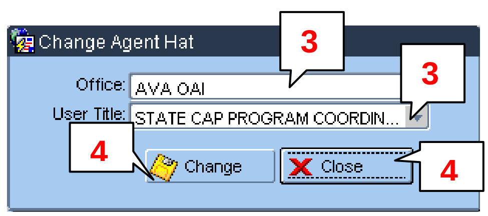


Figure 2: Change Agent Hat Screen

3. Select the appropriate **Office** and **User Title** from the drop-down menus.
4. Click on the Change button and then the Close button to make the change and close the screen.

Issuing Alerts

Issuing a manual Recipient alert to be sent to FSD.

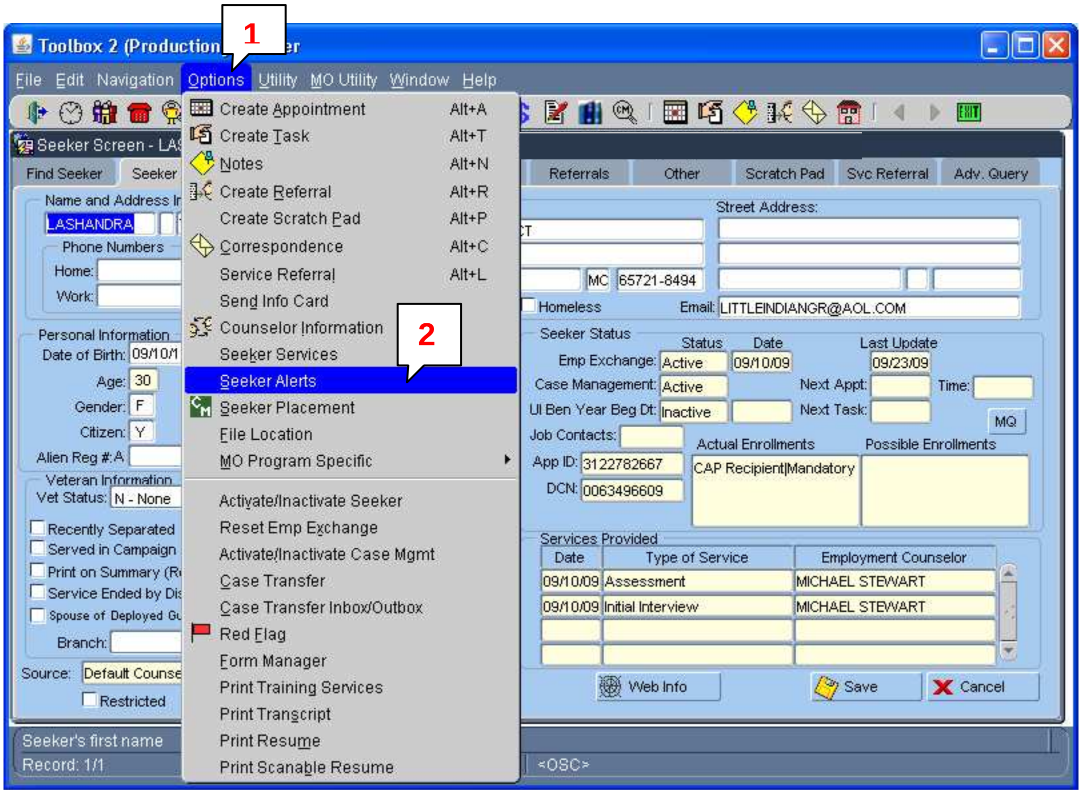


Figure 1: Options Menu/Seeker Alerts Option

Step-by-Step:

1. With a client's record open, click on the  **Options** menu.
2. Select **Seeker Alerts** option.

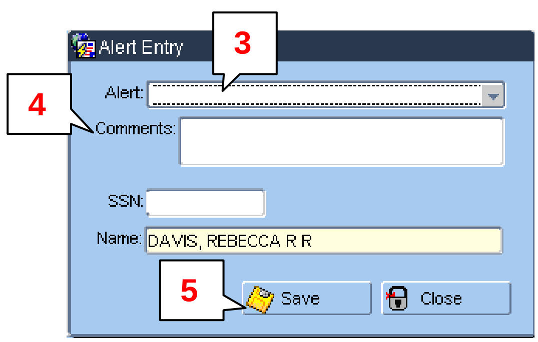


Figure 2: Alert Entry Screen

3. From the **Alert Entry** pop-up screen, select the appropriate alert from the **Alert** field:
   a. Age 60 and Over
   b. Custodial Caretaker of a Child Under 12 Months
   c. Mentally or Physically Disabled
   d. Needed at Home to Care for Disabled Family Member
   e. Notify FSD to Being Sanction Process
   f. Parent Type Change
   g. Recommends Sanction be Lifted
   h. Unable to Locate – No Forwarding Address
   i. Volunteer Not Participating

4. Enter any necessary information into the **Comments** field.
5. Click on the Save button to save the information and to send the alert to FSD. This alert will write to the **Seeker Services** tab within the **Seeker History** module.

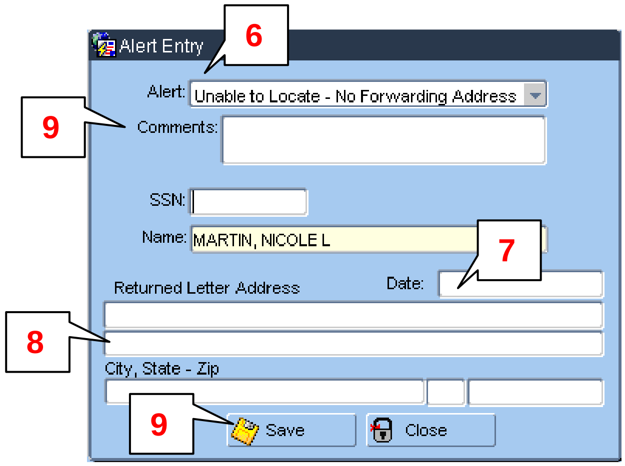


Figure 3: Alert Entry Screen (Unable to Locate-No Forwarding Address)

6. The '**Unable to Locate – No Forwarding Address**' alert screen contains additional fields that are required to be completed before the alert can be sent.
7. In the **Date** field, enter the date the CAP letter was returned.
8. In the **Returned Letter Address** and **City, State – Zip** fields, enter the address listed on the returned CAP letter.
9. As necessary, complete the **Comments** field and click the Save button to send the alert.

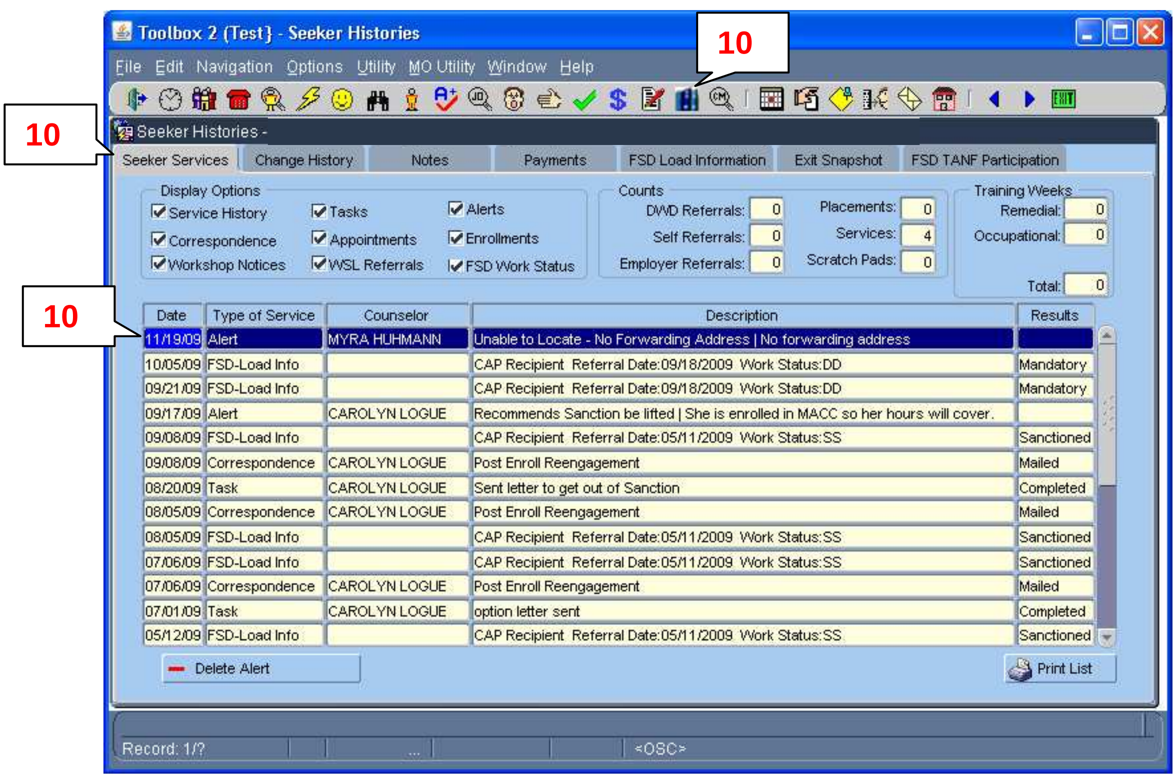


Figure 4: Seeker History Module/Seeker Service Tab

10. To verify an alert was sent, access the **Seeker Services** tab within the **Seeker History** module. The alert will write in the "history".

Issuing Alerts

Issuing a manual Applicant (Good Cause) alert to be sent to FSD.

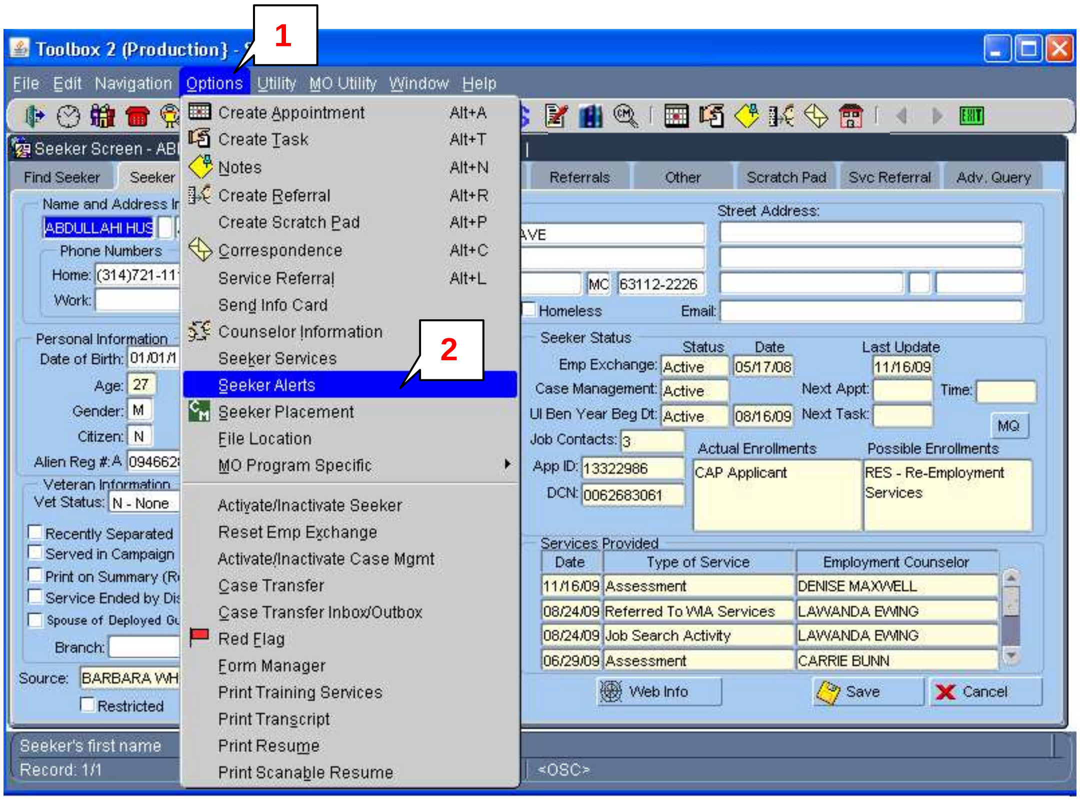


Figure 5: Options Menu/Seeker Alerts Option

Step-by-Step:

1. With a client's record open, click on the Options **Options** menu.
2. Select **Seeker Alerts** option.

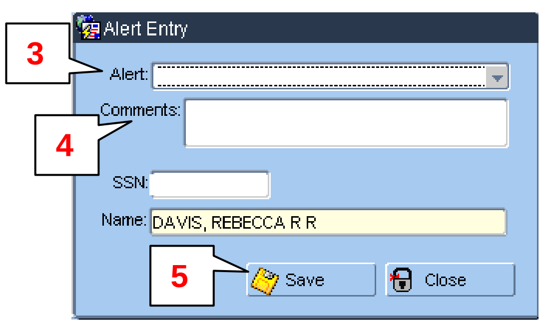


Figure 6: Alert Entry Screen

3. From the **Alert Entry** pop-up screen, select the appropriate alert from the **Alert** field:
   a. Breakdown in Childcare
   b. Breakdown in Transportation
   c. Court-Required Appearance/Incarceration
   d. DWD Not Available to Provide Services
   e. Emergency Family Crisis
   f. Lack of Identified Social Services
   g. Refused a Bona-fide Offer of Employment
4. Enter any necessary information into the **Comments** field.

5. Click on the Save button to save the information and to send the alert to FSD. This alert will write to the **Seeker Services** tab within the **Seeker History** module.

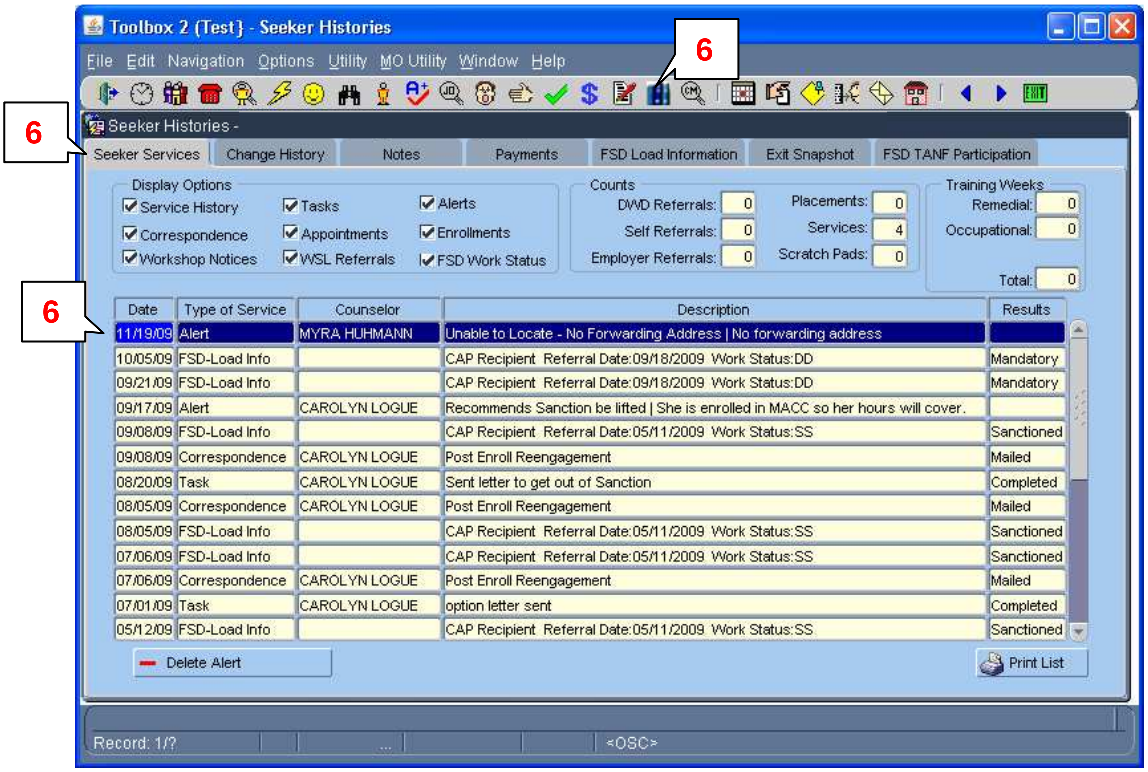


Figure 7: Seeker History Module/Seeker Service Tab

6. To verify an alert was sent, access the **Seeker Services** tab within the **Seeker History** module. The alert will write in the "history".

Deleting Alerts from ‘Daily Referrals Query’

Deleting alerts to be sent to FSD. An alert can be deleted up to 4:00pm the same day it was issued.

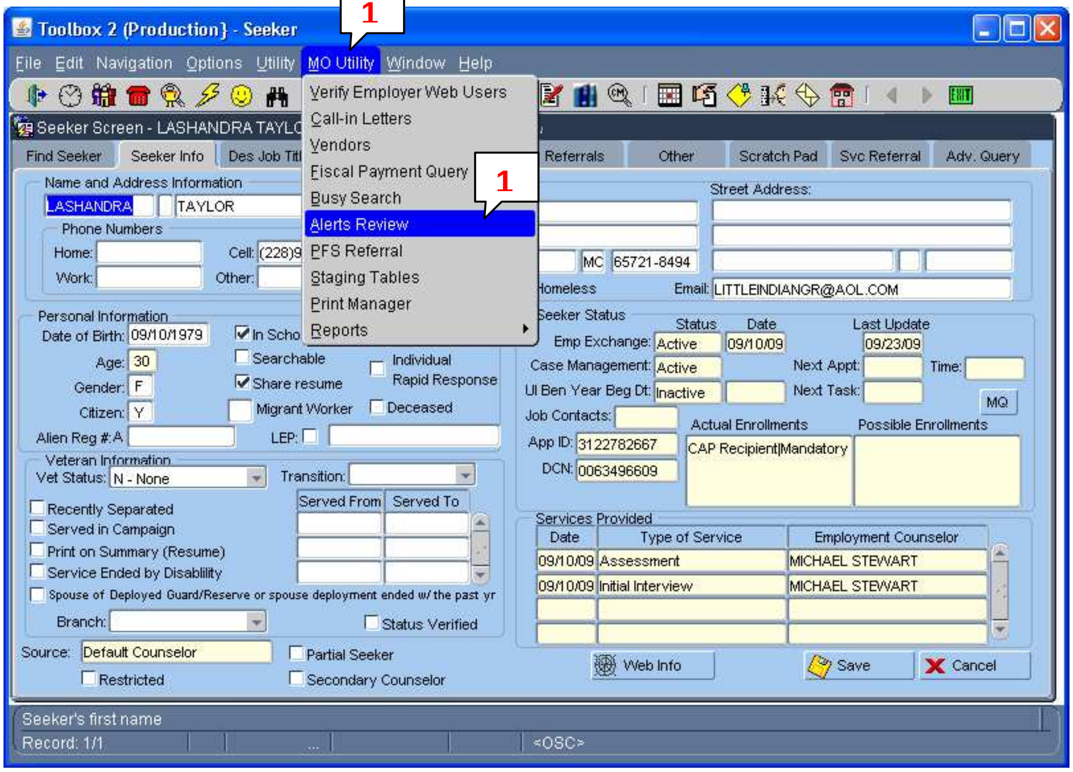


Figure 1: MO Utility Menu/Alerts Review Option

Step-by-Step:

1. From the MO Utility **MO Utility** menu, select **Alerts Review**.

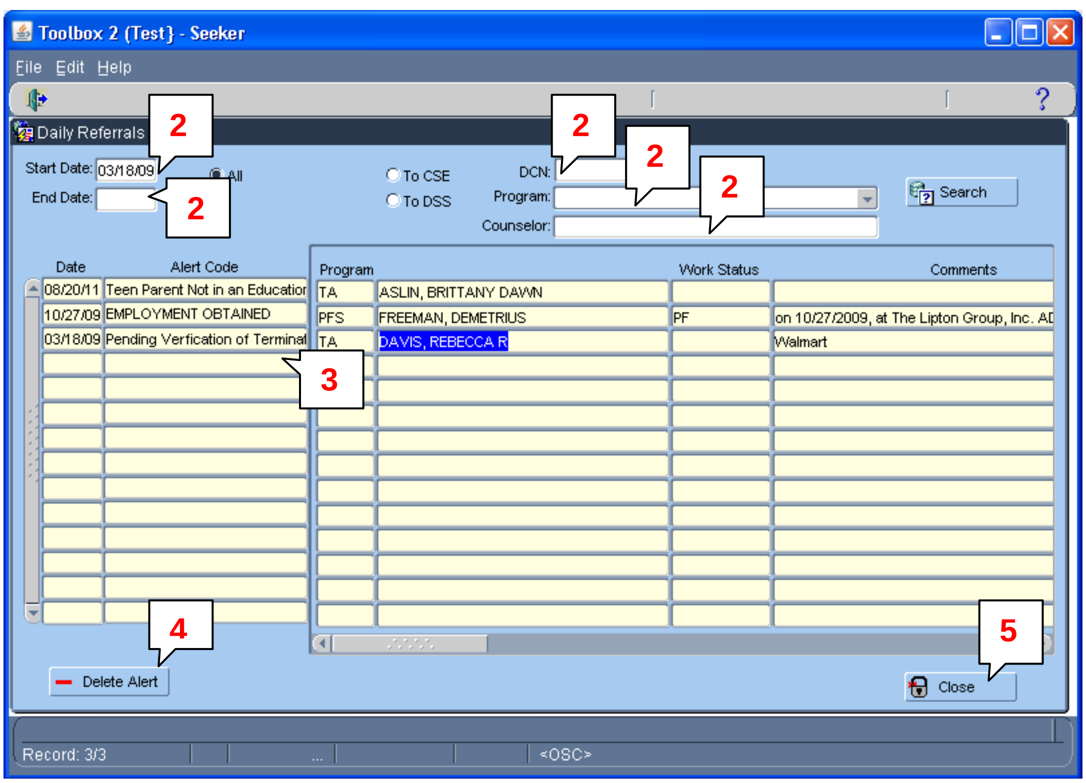
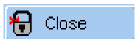


Figure 2: Daily Referral Query Screen

2. Using the fields **Start Date**, **End Date**, **DCN**, **Program**, and **Counselor**, do a search to find the alert you want to delete.
3. Highlight the alert you want to delete.
4. Click on the 

button to delete the alert.
5. Click on the 

button to close the screen.

Deleting Alerts from ‘Seeker Services Tab’

Deleting alerts to be sent to FSD. An alert can be deleted up to 4:00pm the same day it was issued.

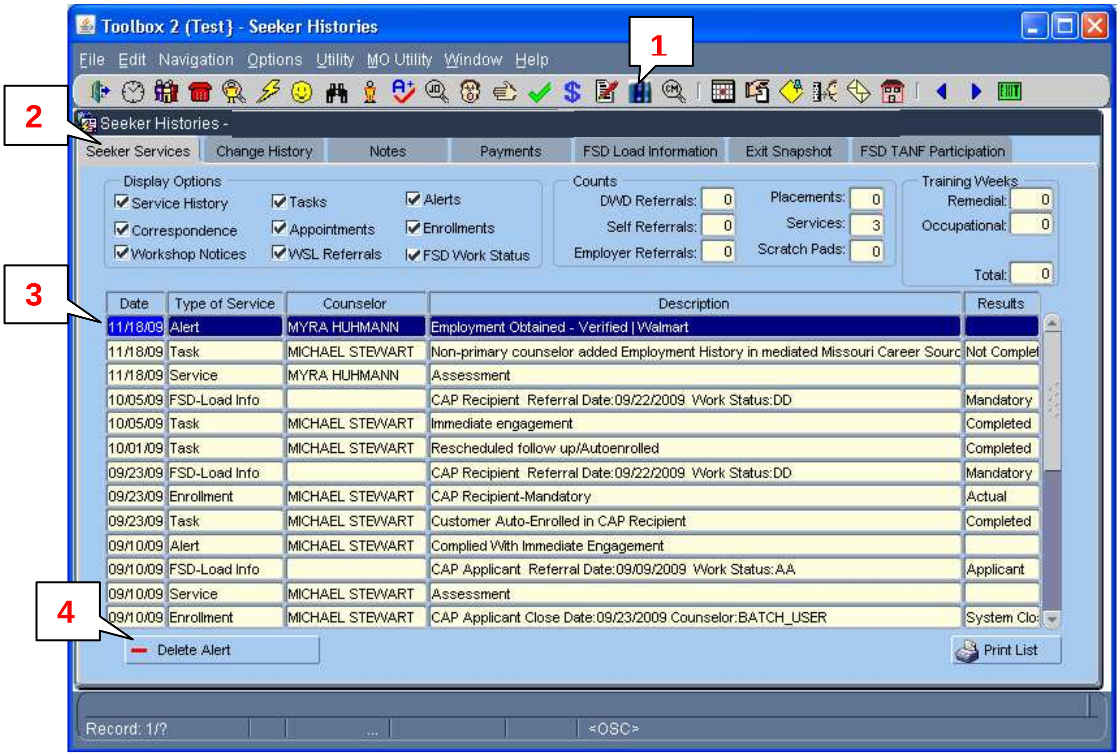


Figure 3: Seeker History Module/Seeker Services Tab

Step-by-Step:

1. Click on **Seeker History** icon.
2. Access the **Seeker Services** tab.
3. Highlight the alert you want to delete.
4. Click the Delete Alert button to delete the alert.

NOTE: For information regarding the Immediate Engagement (IE) alert, please reference the Immediate Engagement section of the desk aid.

Assessment

Completing the assessment for a CAP client.

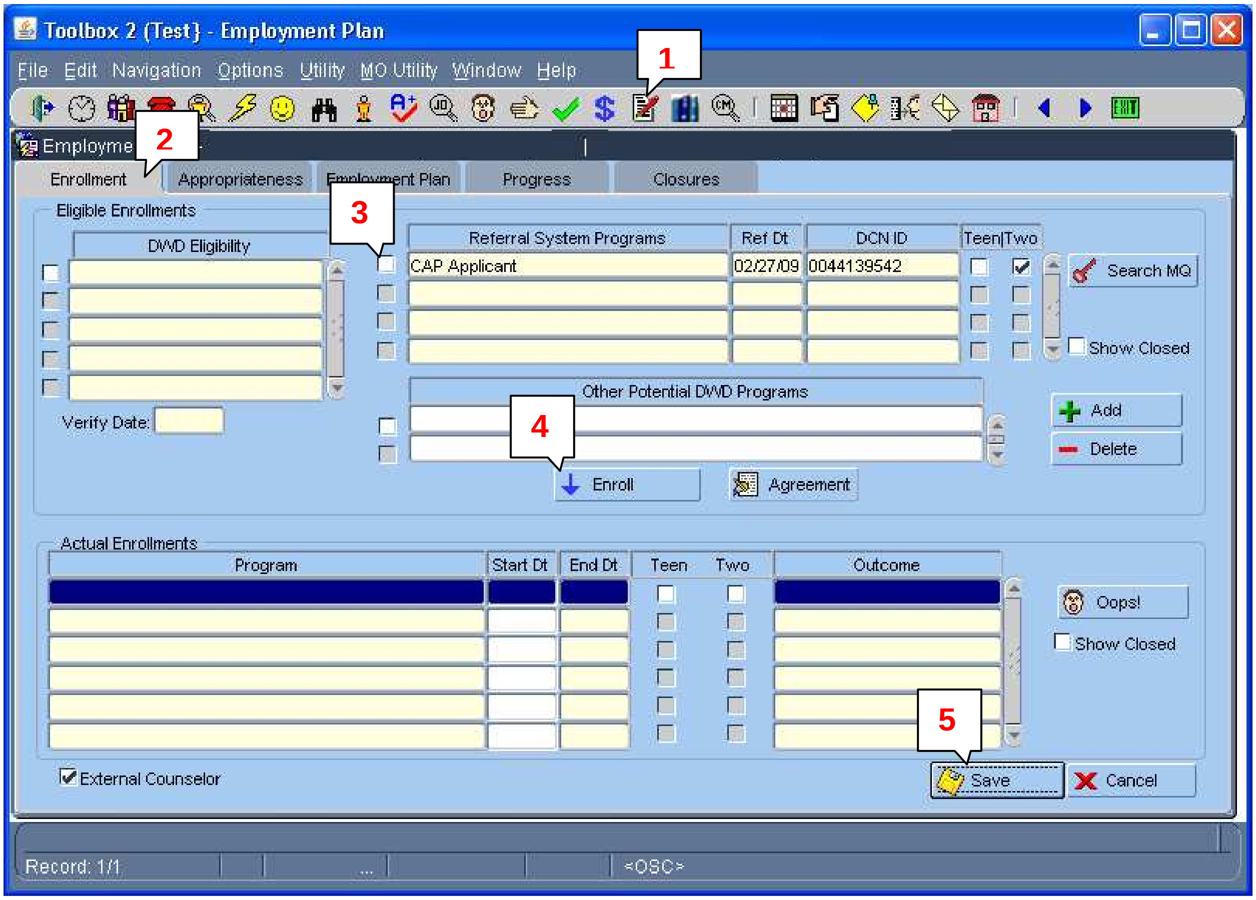


Figure 1: Employment Plan-Enrollment Module/Enrollment Tab

Step-by-Step:

1. Click on **Employment Plan/Enrollment** icon.
2. Access the **Enrollment** tab.
3. Under the section **Referral System Programs**, check/click the field to the left of the CAP Applicant or CAP Recipient referral.
4. Click the Enroll button to enroll the client into the CAP program. The referral will move from the **Referral System Programs** section to the **Actual Enrollments** section.
5. Click on the Save button to save the enrollment.

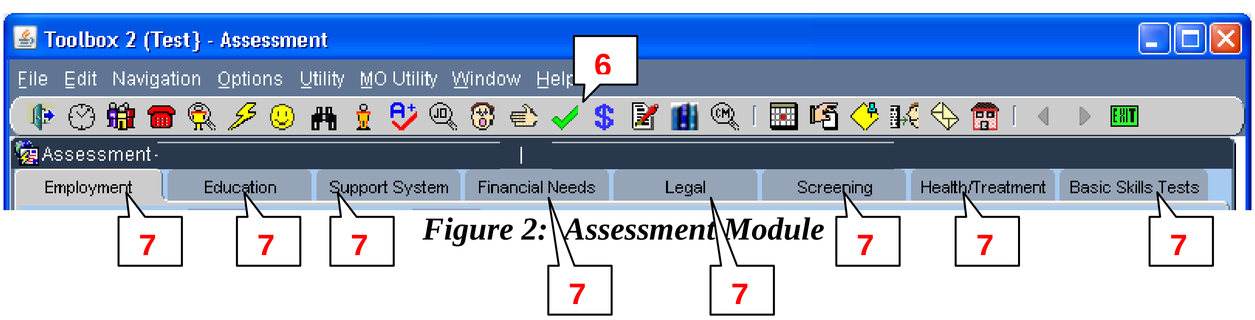


Figure 2: Assessment Module

6. Click on **Assessment** icon.

7. Based on the client's answers to the 'TA Applicant Assessment', complete all necessary tabs within the **Assessment** module. The tabs include **Employment**, **Education**, **Support System**, **Financial Needs**, **Legal**, **Screening**, **Health/Treatment**, and **Basic Skills Tests**.

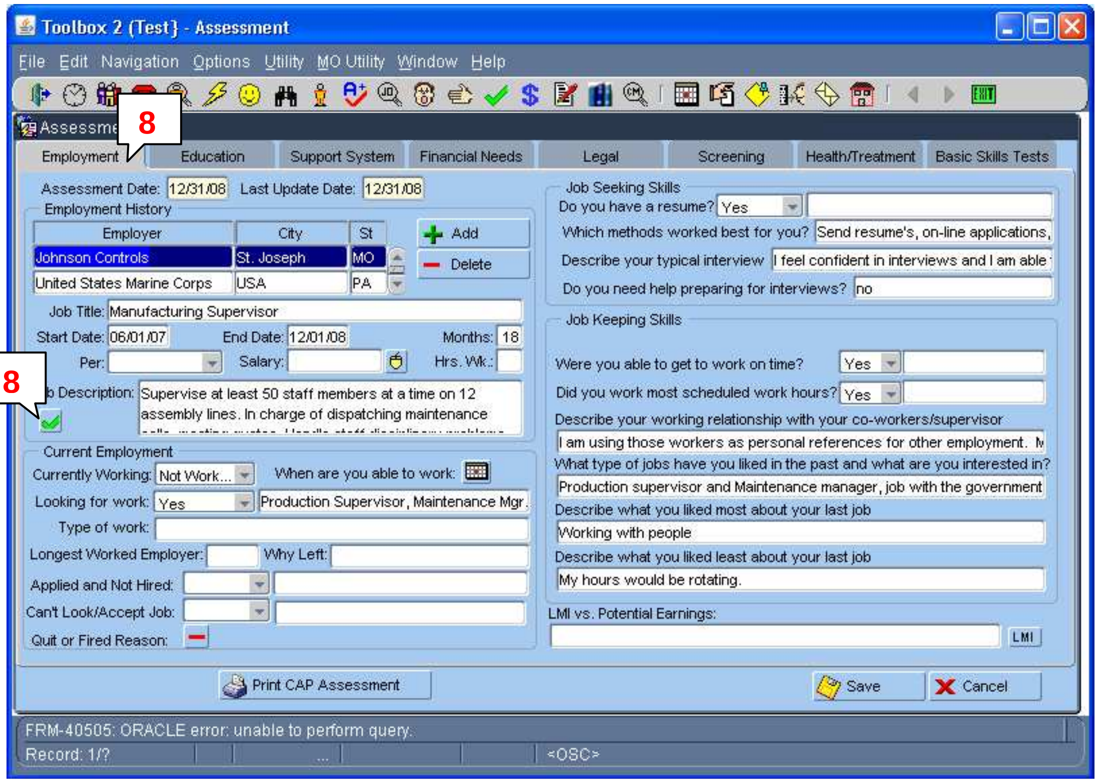


Figure 3: Assessment Module/Employment Tab

8. On the **Employment** tab, you can access the **Work History Alert** screen by clicking on the ✔ button.

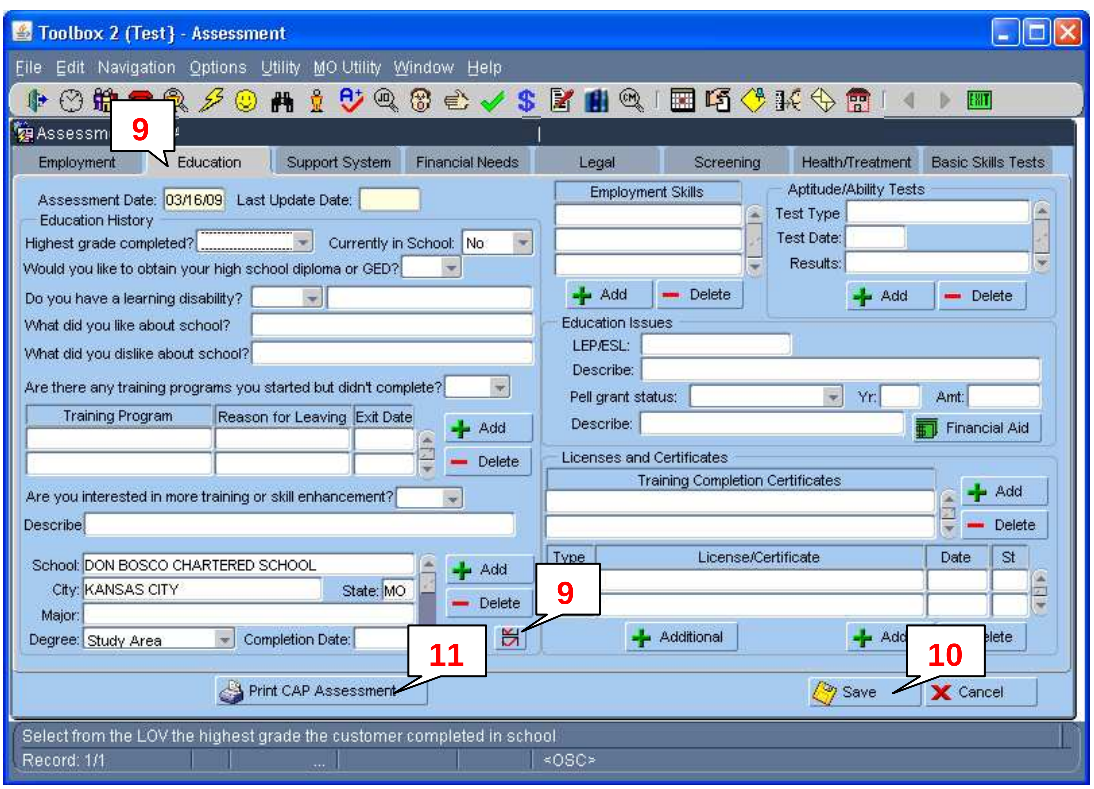


Figure 4: Assessment Module/Education Tab

9. On the **Education** tab, you can access the **Teen Parent in an Educational Activity Alert** screen by clicking on the  button.
10. Once all relevant information is entered on the tabs within the **Assessment** module, click the  button.
11. Click on the  button to print the CAP assessment form.
12. The client is required to sign the printed CAP assessment form.

Case Management Search

Viewing a list of active CAP clients by counselor.

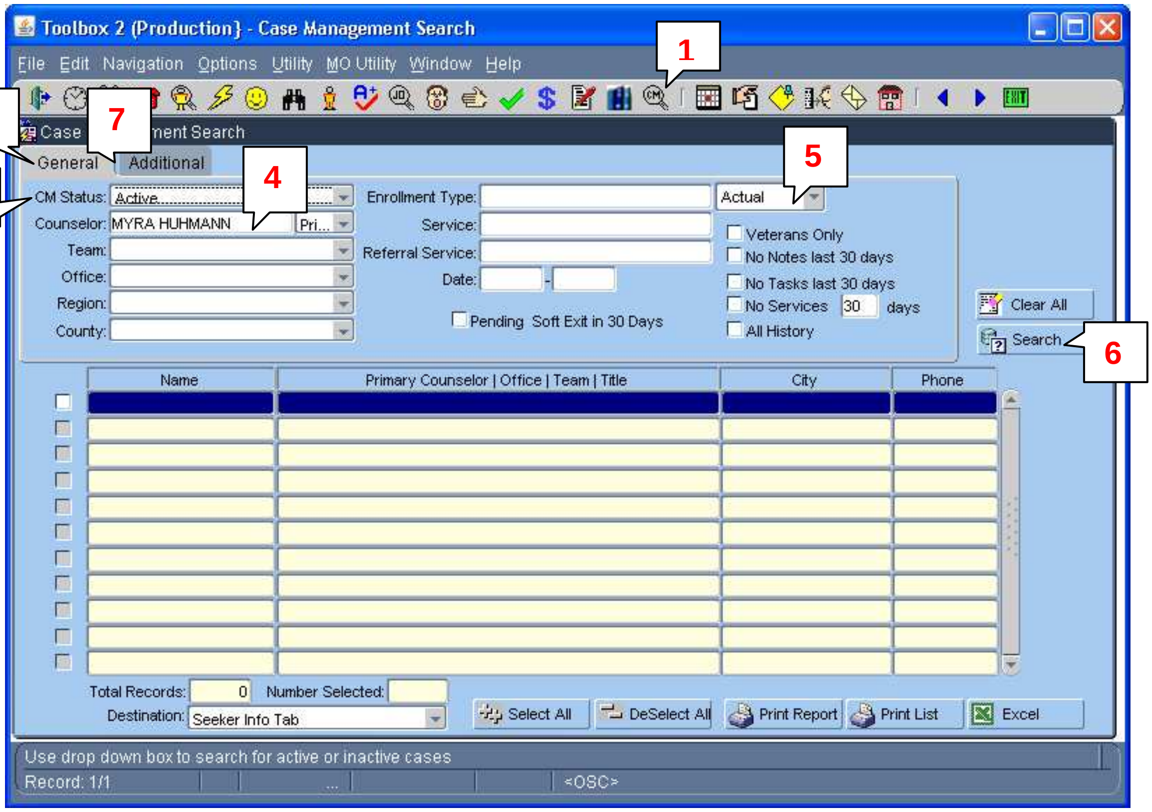
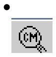
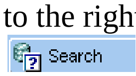


Figure 1: Case Management Search Module/Case Management Search Screen

Step-by-Step:

1. Click on the  **Case Management Search** icon to access the **Case Management Search** screen.
2. The **General** tab will display.
3. The field **CM Status** must display 'Active'.
4. The field **Counselor** must display your name. [If you prefer to search by different criteria such as **Team**, **Office**, **Region**, or **County**, you do not need to select a **Counselor**.]
5. The field to the right of **Enrollment Type** must display 'Actual'.
6. Click the  button.
7. Additional fields on the **General** and **Additional** tabs can be completed to refine the search.

Case Management Search

Viewing a list of either CAP recipient or CAP applicant records.

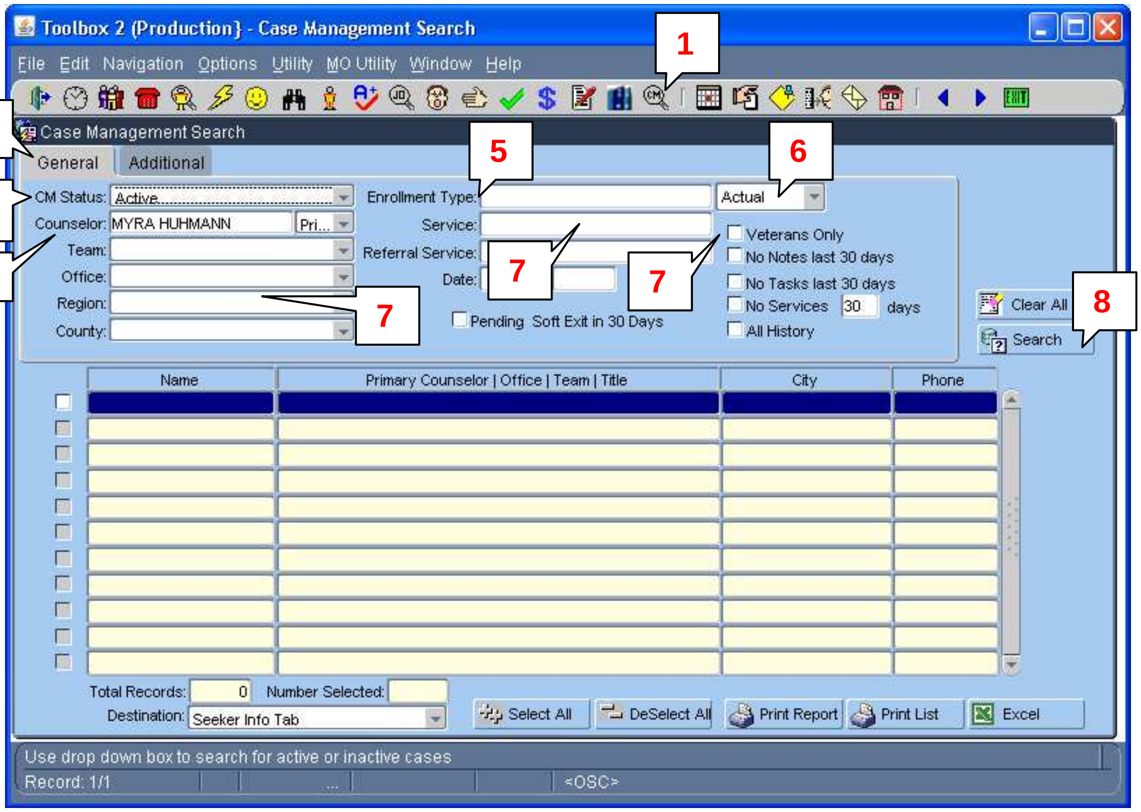


Figure 1: Case Management Search Module/Case Management Search Screen

Step-by-Step:

1. Click on the **Case Management Search** icon to access the **Case Management Search** screen.
2. The **General** tab will display.
3. In the **CM Status** field, you have the option to view 'Active' or 'Inactive' records.
4. In the **Counselor** field, double click or press the F2 button to access a list of counselor names. Select the appropriate counselor.
5. In the **Enrollment Type** field, double click to access a list of programs. Select either 'CAP Applicant' or 'CAP Recipient'. If 'CAP Recipient' is selected, use the tab key to forward to the next field to make the **Category** screen pop-up. From the **Category** screen, you must select Mandatory, Sanctioned, or Voluntary.
6. In the field to the right of **Enrollment Type**, from the drop-down menu, select **Actual**, **Possible**, or **Both**.
   - **Actual** indicates that the client is 'enrolled' in the CAP program within the Employment Plan/Enrollment module in Toolbox 2.0.
   - **Possible** indicates that the client has been referred from FSD and is eligible to be 'enrolled' into the CAP program within the Employment Plan/Enrollment module in Toolbox 2.0.
   - **Both** encompasses both **Actual** and **Possible** clients.
7. Additional fields can be completed to refine the search. These additional fields include **Team**, **Office**, **Region**, **County**, **Service**, **Date**, **Veterans Only**, **No Notes last 30 days**, **No Tasks last 30 days**, **No Services __ days**, and **All History**.
8. Click the Search button.

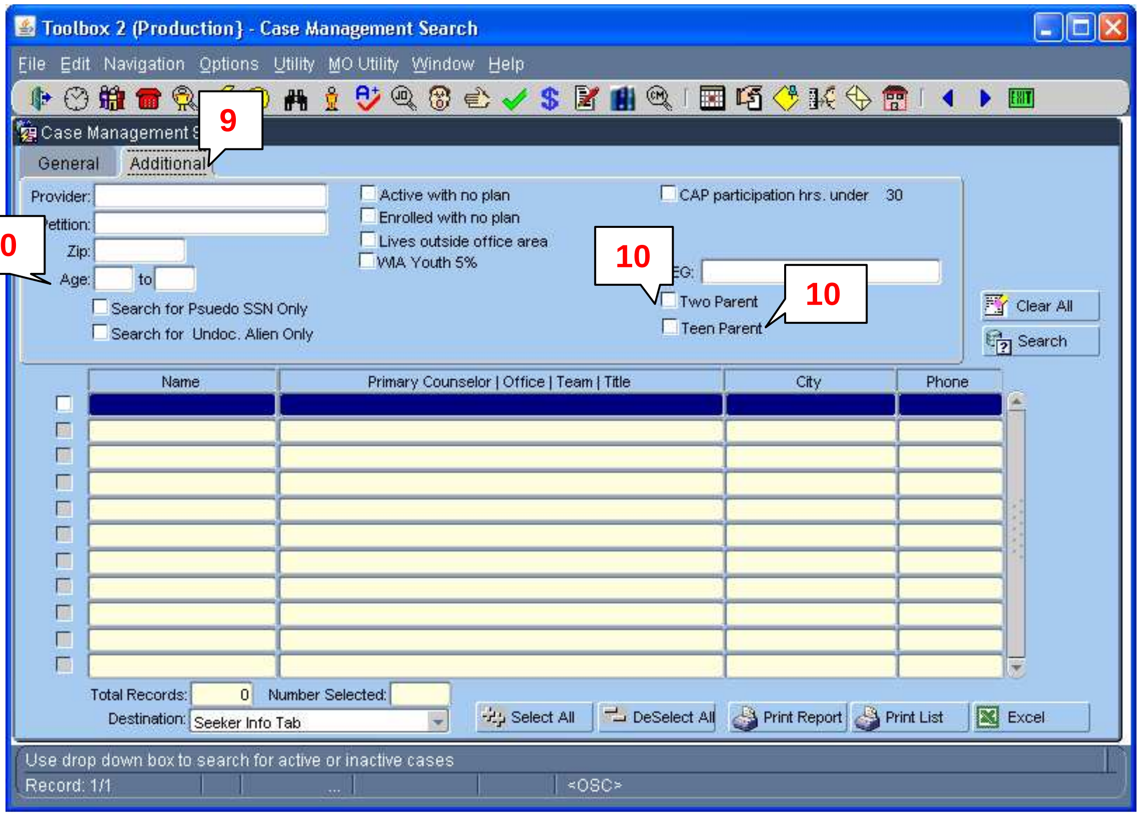


Figure 2: Case Management Search Module/Case Management Search Screen

9. Click on the **Additional** tab to limit the search further.
10. Complete the fields of **Age**, **Two Parent**, **Teen Parent**, etc. as necessary. Two Parent and Teen Parent fields only apply to CAP.

Case Management Search

Sorting data within search results.

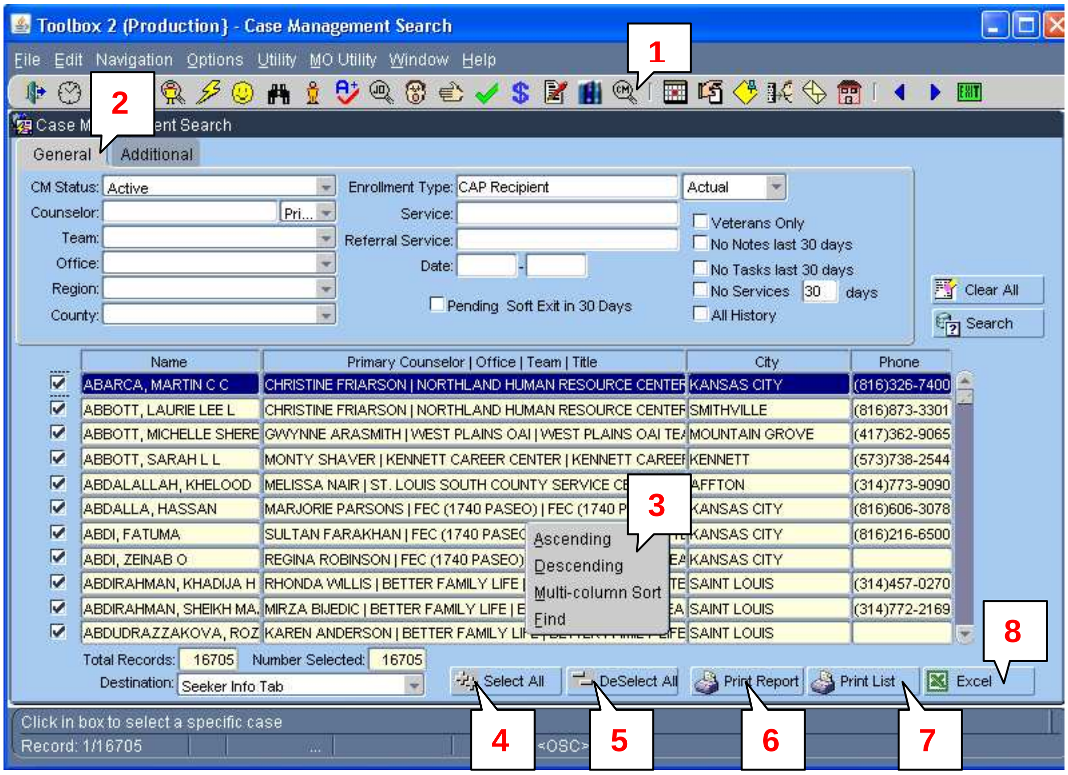


Figure 1: Case Management Search Module/Sorting Menu

Step-by-Step:

1. Click on the **Case Management Search** icon to access the **Case Management Search** screen.
2. The **General** tab will display.
3. After completing the needed search, right click in the column **Primary Counselor | Office | Team | Title** to sort data by Ascending, Descending, Multi-Column Sort, or Find.
4. The Select All button allows you to select all records within the search.
5. The DeSelect All button allows you to de-select all records within the search.
6. The Print Report generates a Case Management Customer Report which includes the client's name, address, phone number, date of last case note, date of next appointment, date of next contact, date and type of service(s) client is enrolled in, any possible and actual enrollment the client that corresponds to the client, etc.
7. The Print List generates a Case Management Customer List which contains the client's SSN, name, App ID, DCN ID, Counselor Name, City, and Phone number.
8. The Excel button allows you to import the case manager search data into an Excel spreadsheet which include the fields Name, Counselor/Location, City and Phone.

Case Management Search

Reassigning a primary counselor from the Case Management Search screen.

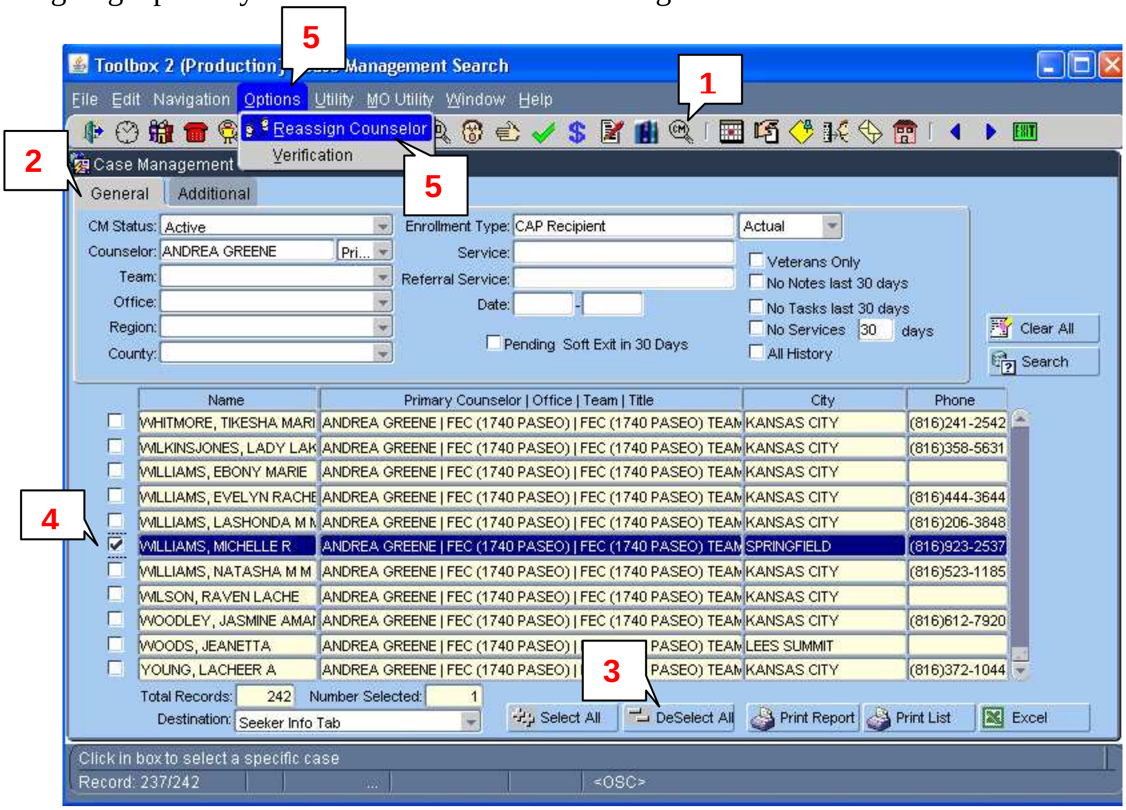


Figure 1: Case Management Search Module/Options Menu/Reassigning Counselor Option

Step-by-Step:

1. Click on the **Case Management Search** icon to access the **Case Management Search** screen.
2. Access the **General** tab. [**NOTE:** You must be logged into the same location as the record you are transferring.]
3. Click the DeSelect All button to deselect all records. If you are transferring an entire caseload, skip this step.
4. For the record(s) you wish to reassign a primary counselor, check the field(s) to the left of the client's name.
5. From the Options **Options** menu, select **Reassign Counselor**. A pop-up to select a counselor will appear.

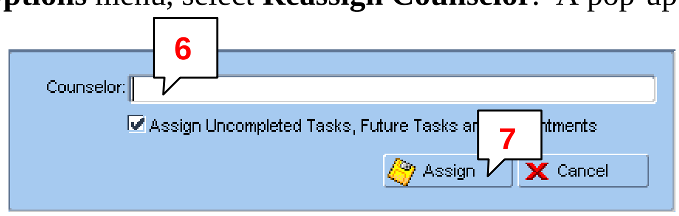


Figure 2: Counselor Screen

6. Double-click or press the F2 key in the **Counselor** field to access a list of counselors.
7. Once a counselor is selected, click on the Assign button.

<u>Case Management Transfer Clerk</u>

Only <u>one staff person per location</u> can be assigned as the '**Case Management Transfer Clerk**'. However, a staff person can be listed as the '**Case Management Transfer Clerk**' for more than one location.

The '**Case Management Transfer Clerk**' has the responsibility to send case transfer requests to the appropriate 'Case Transfer Clerk'; descriptions provided below. [The 'Case Transfer Clerk' will receive all transfer tasks, regardless of what program the customer is tied to.] The 'Case Management Transfer Clerk' may also serve as any or all of the 'Case Transfer Clerks'. Also, multiple staff may serve as the different types of 'Case Transfer Clerks'.

Different Types of Case Transfer Clerks:

- ***Case Transfer:*** has the ability to transfer a case from one office to another office.
- ***Case Transfer Mailbox:*** has the ability to assign a case received from another office to a counselor within the receiving office.
- ***Reassign Counselor:*** has the ability to assign a case from one counselor to another counselor within the same office location.
- ***Reassign Appointments/Tasks:*** has the ability to transfer appointments and tasks to another counselor within the same office location. (This is necessary when a counselor is out of the office for an extended period of time due to vacation, illness, etc.)

Case Transfer

Transferring a case to another office.

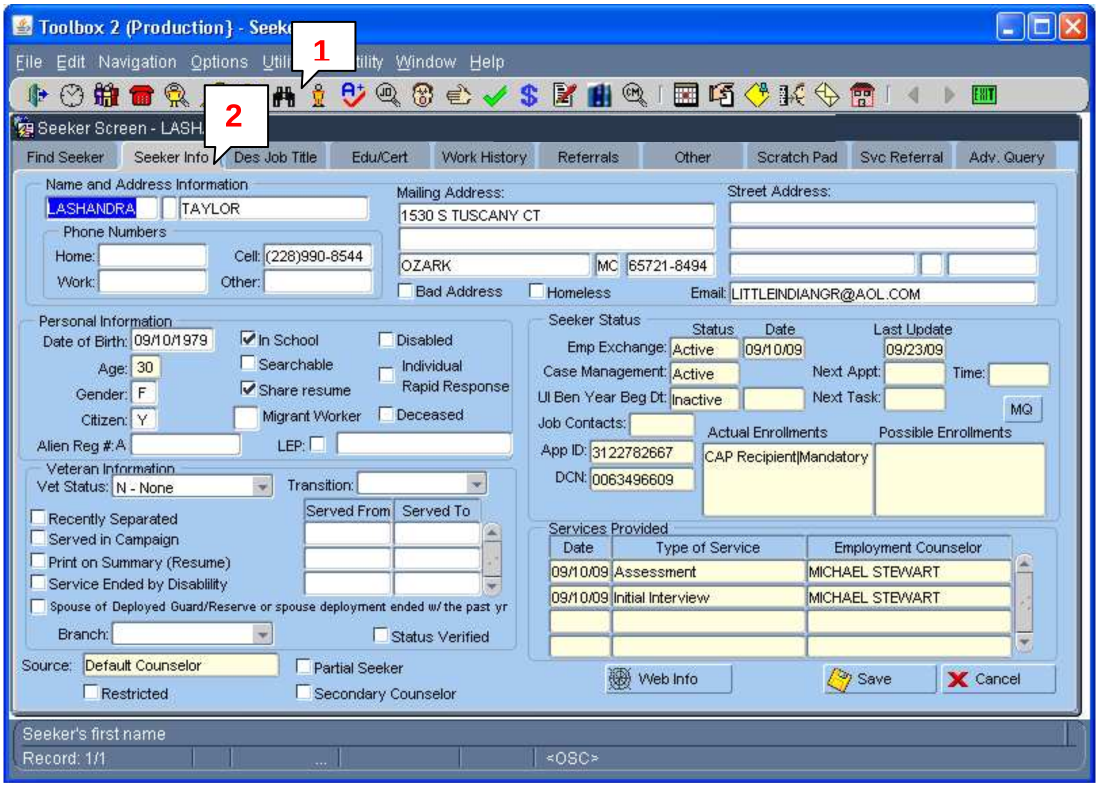


Figure 1: Find Seeker Module/Seeker Info Tab

Step-by-Step:

1. Click on the **Find Seeker** icon to access a client's record.
2. Click on the **Seeker Info** tab.

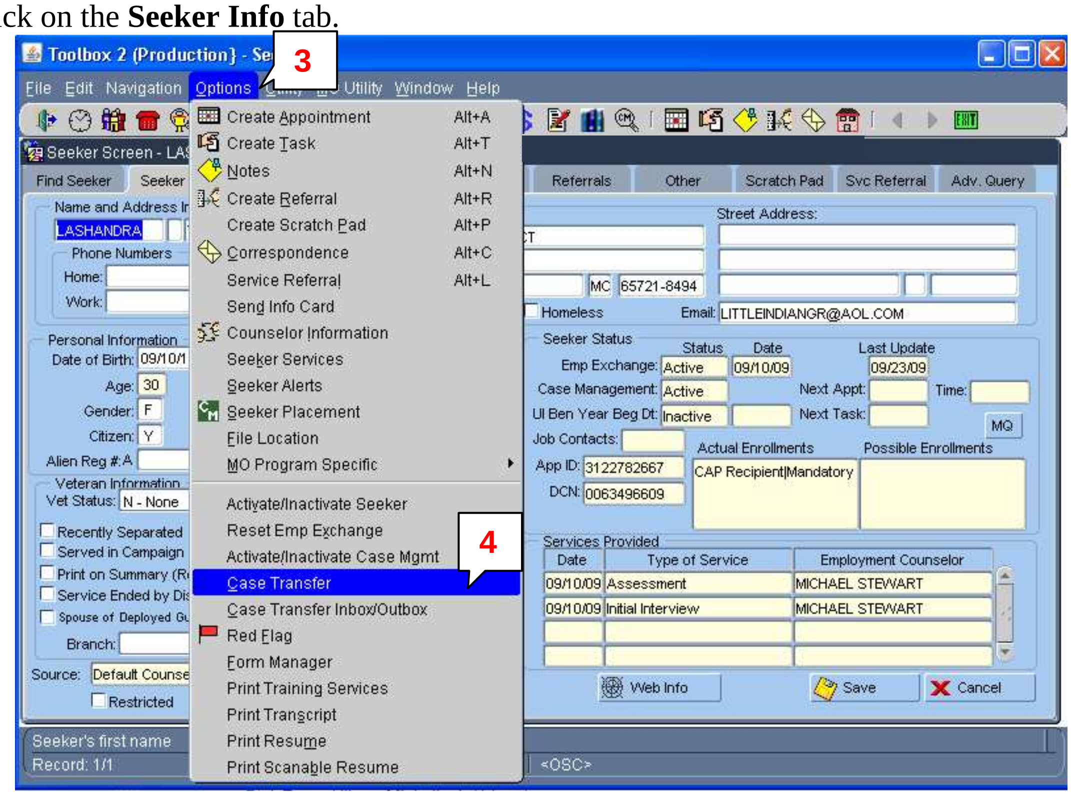


Figure 2: Options Menu/Case Transfer Option

3. Click on  **Options** menu.
4. Select **Case Transfer**. A Case Transfer screen will pop-up.

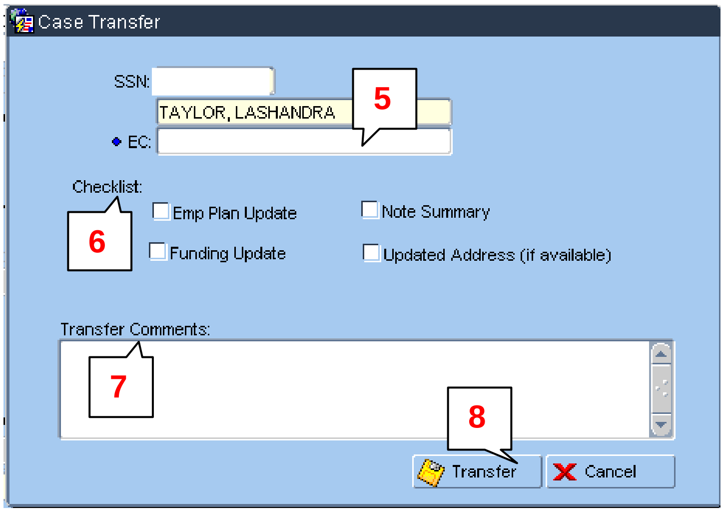
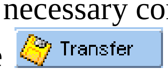


Figure 3: Case Transfer Screen

5. Double-click or press the F2 button while in the **EC** field for a list of possible locations.
6. With a location selected, check the applicable fields listed under **Checklist**.
7. Add any necessary comments in the **Transfer Comments** field.
8. Click the  button to transfer the client's record.

Retrieving Case Transfer

Retrieving a case that was transferred to another office.

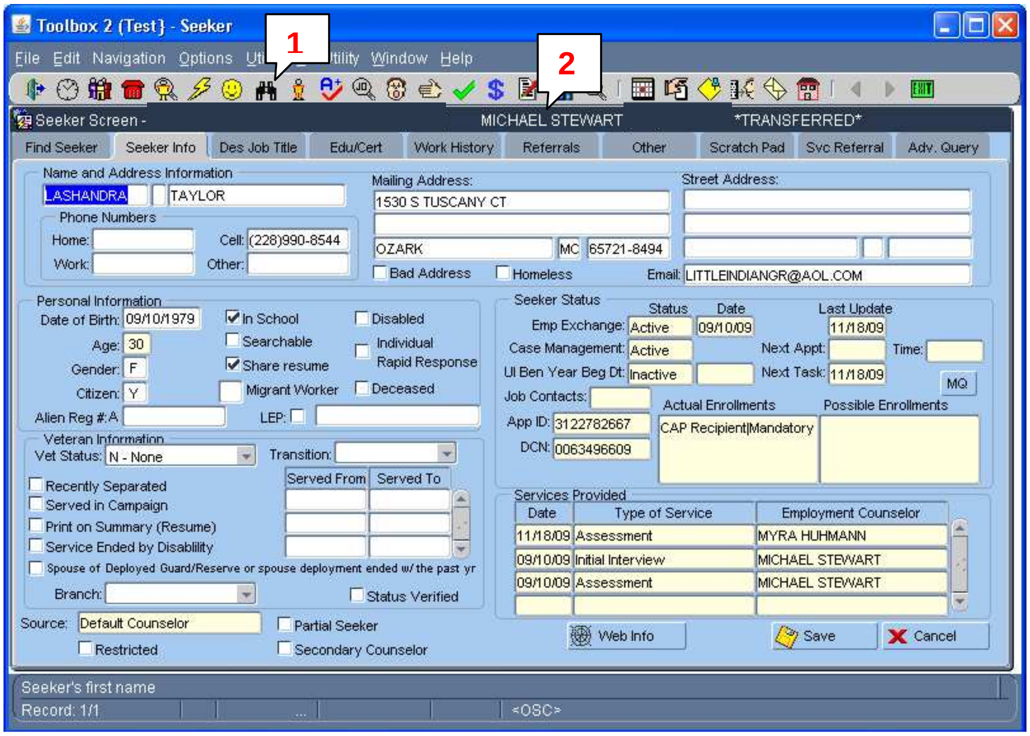


Figure 1: Find Seeker Module/Seeker Info Tab

Step-by-Step:

1. If the location of the client's record is unknown, use the **Find Seeker** icon to access the client's record.
2. The Primary Counselor is identified on the top right of the record.

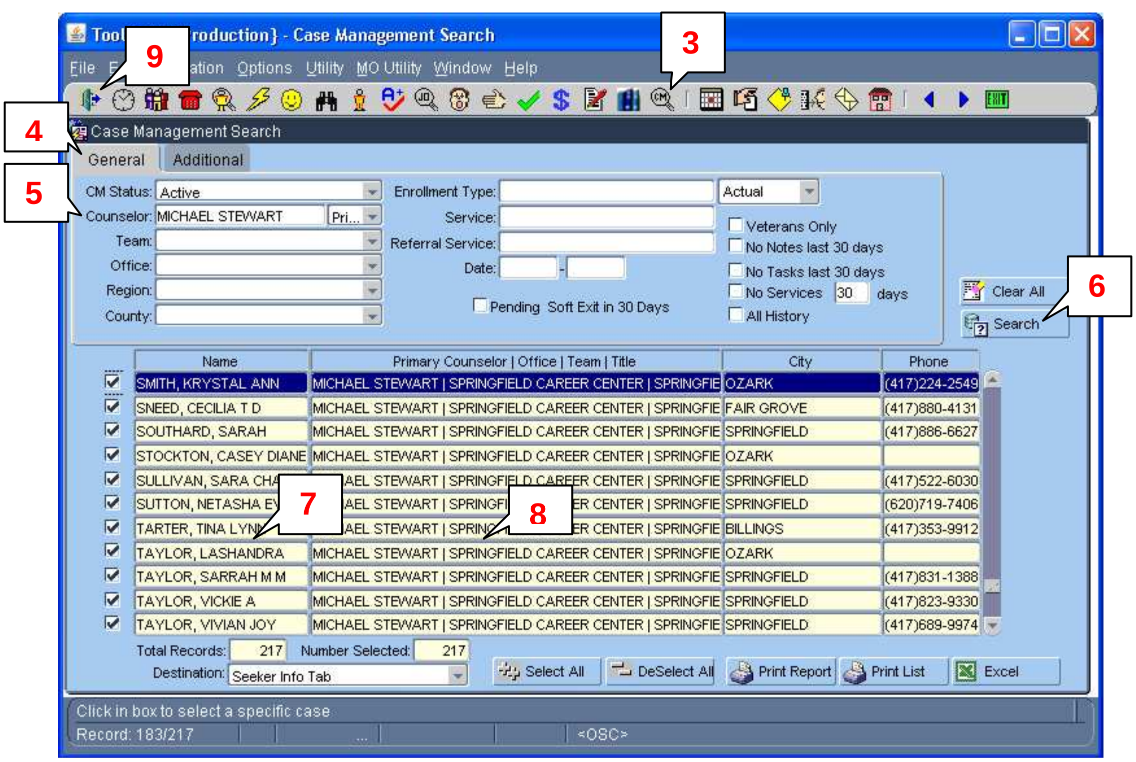


Figure 2: Case Management Search Module/General Tab

3. Click the **Case Management Search** icon to access the **Case Management Search** screen.
4. The **General** tab will display.
5. Enter the Primary Counselor's name into the **Counselor** field. [Complete any other applicable fields.]
6. Click the Search button to access the Primary Counselor's caseload.
7. From the returned search, find the client's record.
8. Use the field **Primary Counselor | Office | Team | Title** to determine the location of the client's record.
9. Close the client's record and access the **Splash** screen.

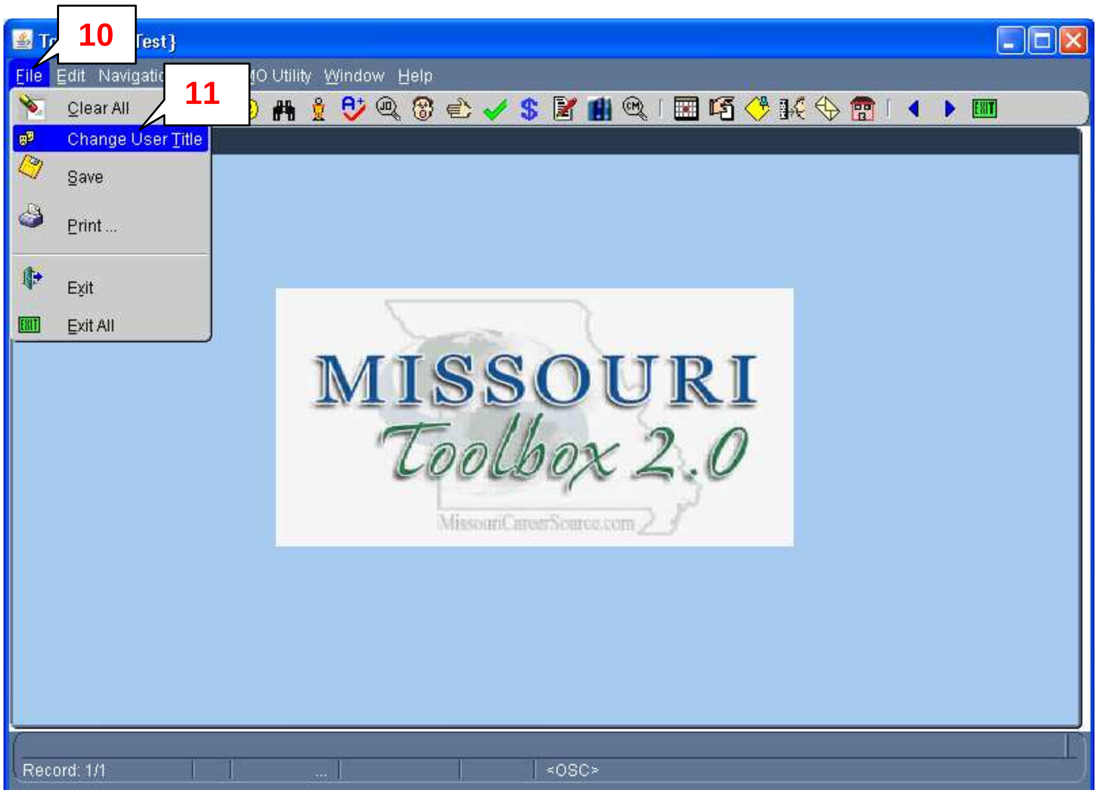


Figure 3: Splash Screen/File Menu/Change User Title Option

10. Click on the File **File** menu.
11. Select **Change User Title**. A Change Agent Hat screen will pop-up.

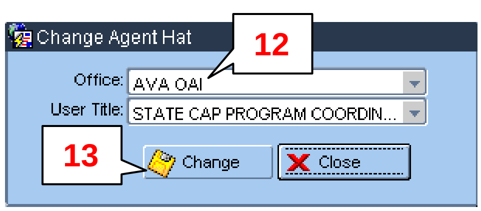


Figure : Change Agent Hat Screen

12. Change the **Office** field to match the Primary Counselor's location.
13. Click the Change button to change the office location.

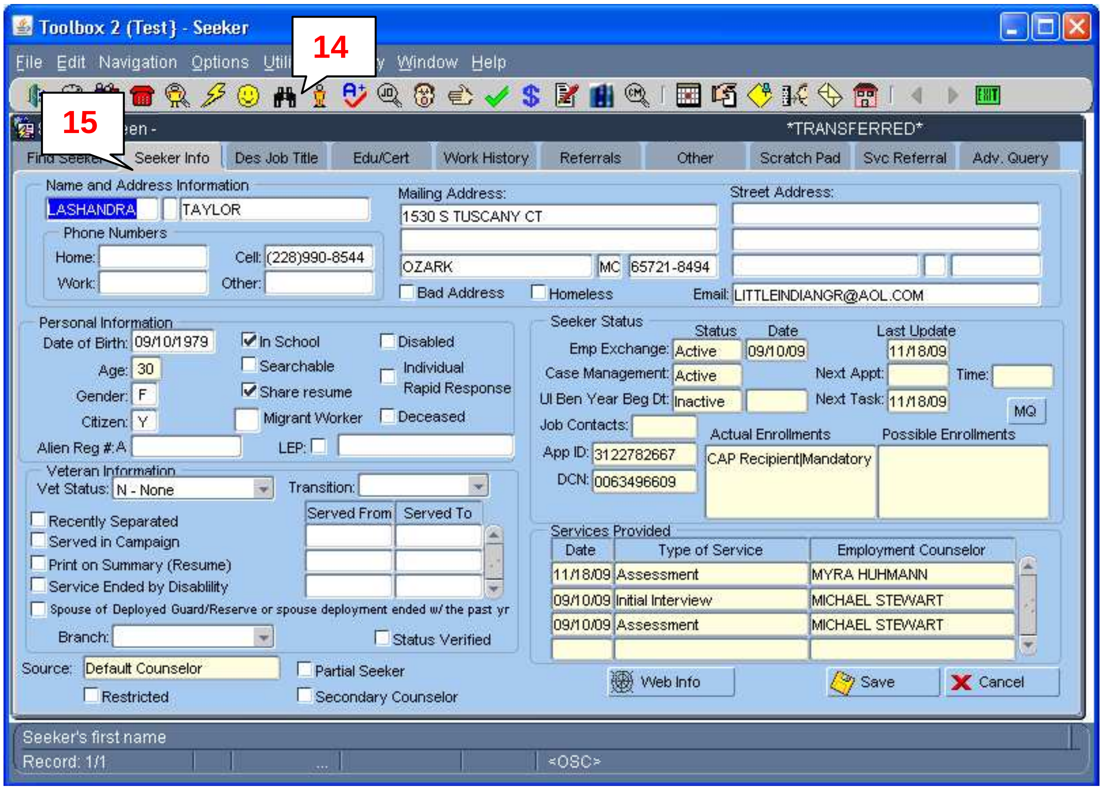


Figure 4: Find Seeker Module/Seeker Info Tab

14. Click the **Find Seeker** icon to access the client's record.
15. Access the **Seeker Info** tab.

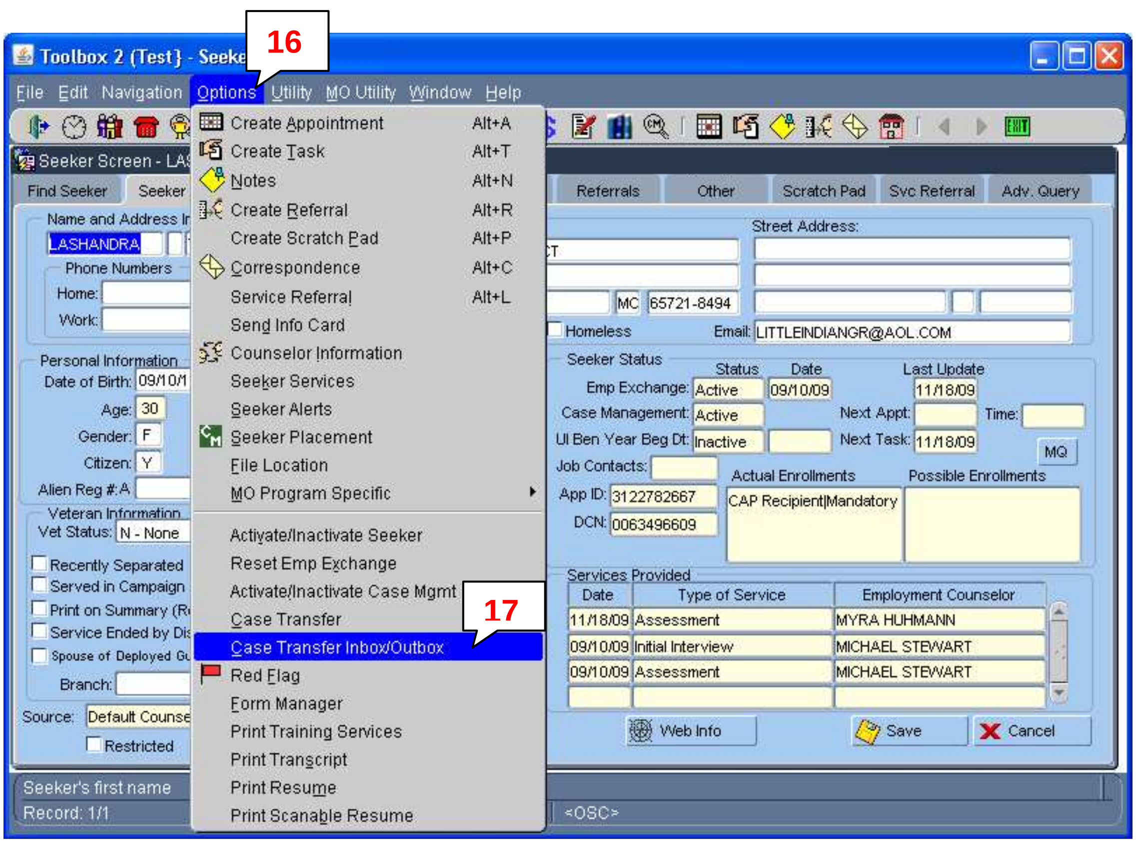


Figure 5: Options Menu/Case Transfer Inbox-Outbox Option

16. Click on the Options **Options** menu

17. Select **Case Transfer Inbox/Outbox**. The Case Transfer Inbox/Outbox screen will appear.

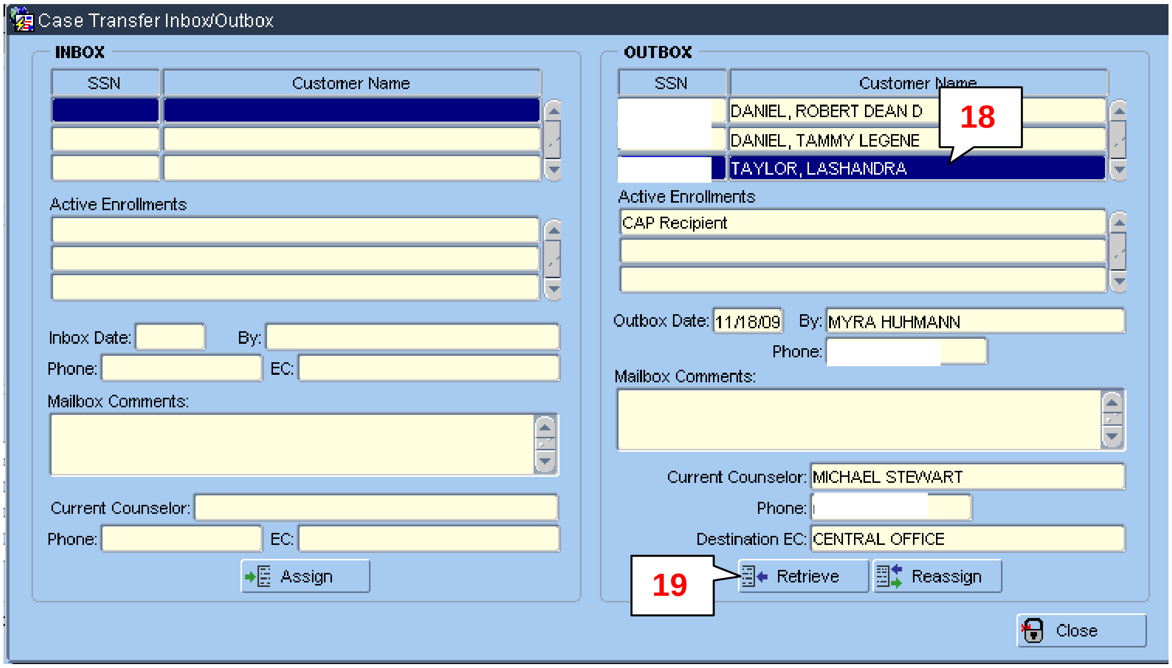


Figure 6: Case Transfer Inbox/Outbox Screen

18. In the **Outbox** section, highlight the client you wish to retrieve.
19. Click the  button to retrieve the client's record. A Retrieve Case screen will pop-up.

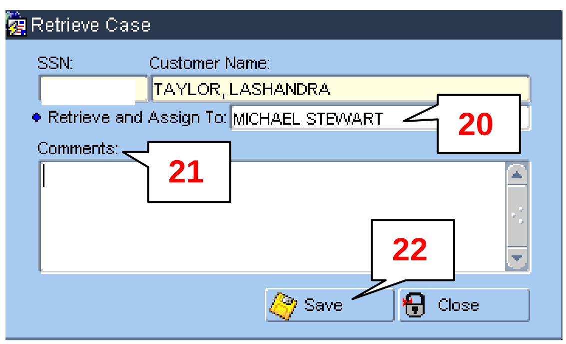
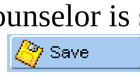


Figure 7: Retrieve Case Screen

20. In the **Retrieve and Assign To** field will allow you to assign a Primary Counselor. Double-click for a list of counselors.
21. After a counselor is selected, add any necessary information into the **Comments** field.
22. Click the  button. You will receive a confirmation message.

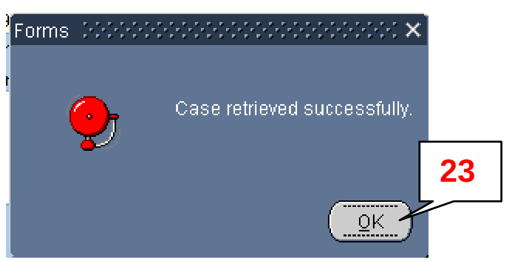


Figure 8: Forms Message

23. Click the  button. The client will be removed from the **Outbox** field and placed in the **Inbox** field.

Reassigning a Case Transfer

Reassigning a case that was transferred to another office.

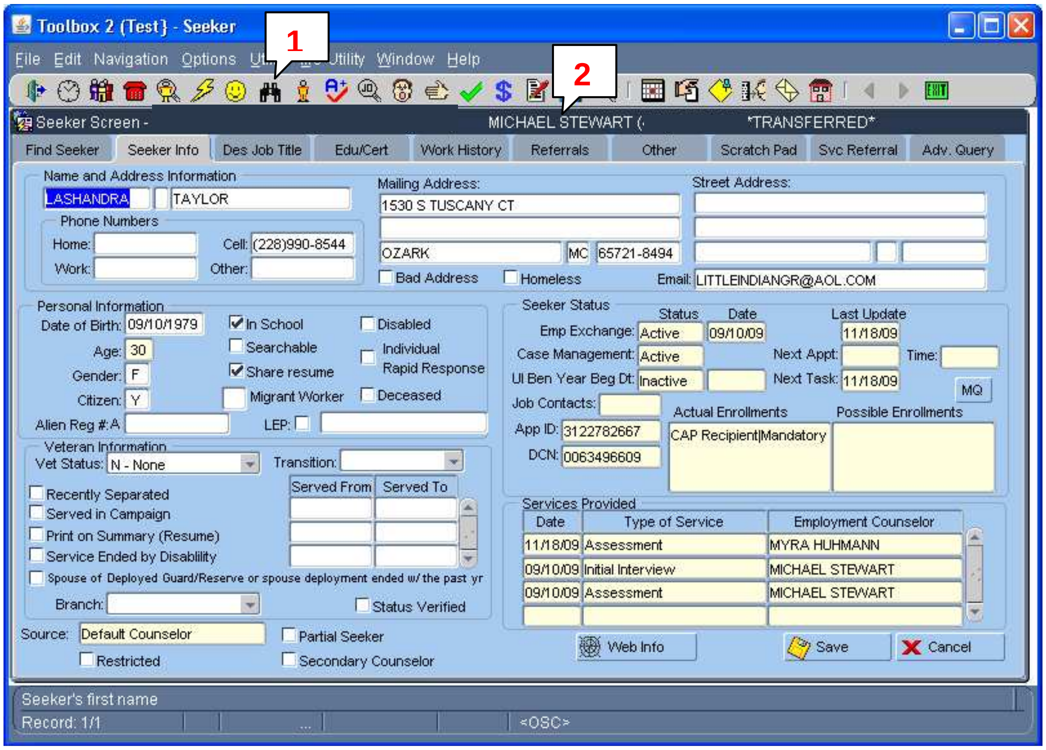


Figure 1: Find Seeker Module/Seeker Info Tab

Step-by-Step:

1. If the location of the client's record is unknown, use the **Find Seeker** icon to access the client's record.
2. The Primary Counselor is identified on the top right of the record.

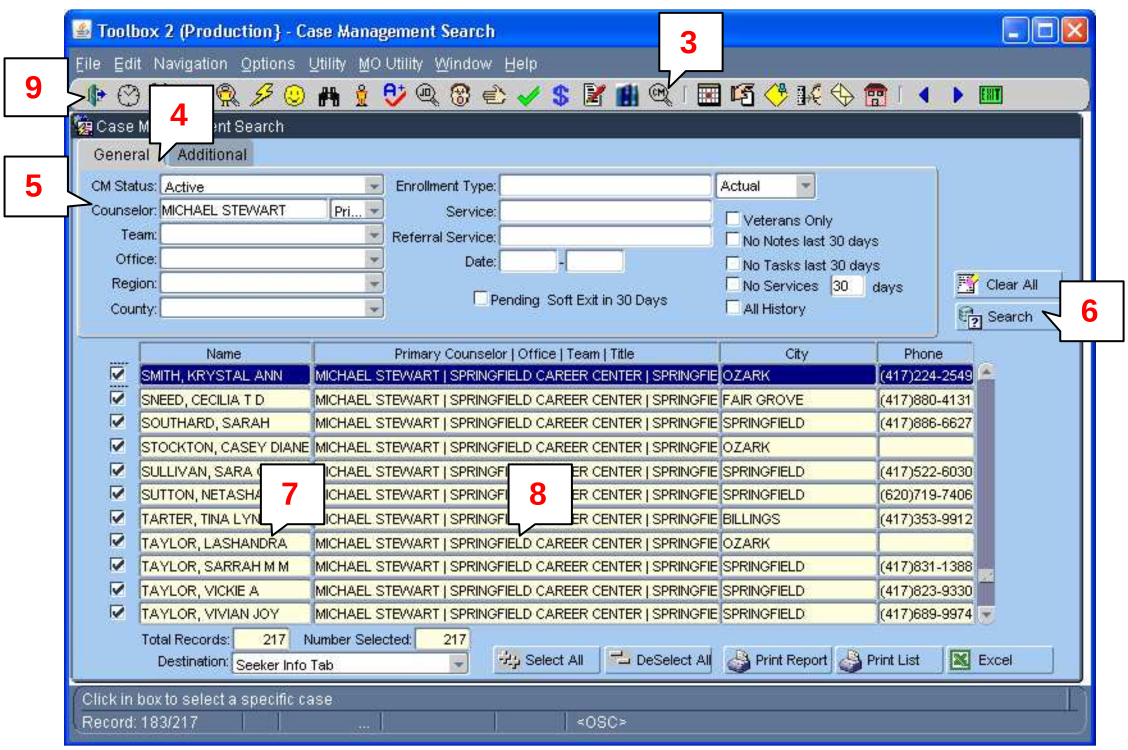


Figure 2: Case Management Search Module/General Tab

3. Click the Case Management Search icon to access the **Case Management Search** screen.
4. The **General** tab will display.
5. Enter the Primary Counselor's name into the **Counselor** field. [Complete any other applicable fields.]
6. Click the Search button to access the Primary Counselor's caseload.
7. From the returned search, find the client's record.
8. Use the field **Primary Counselor | Office | Team | Title** to determine the location of the client's record.
9. Close the client's record and access the **Splash** screen.

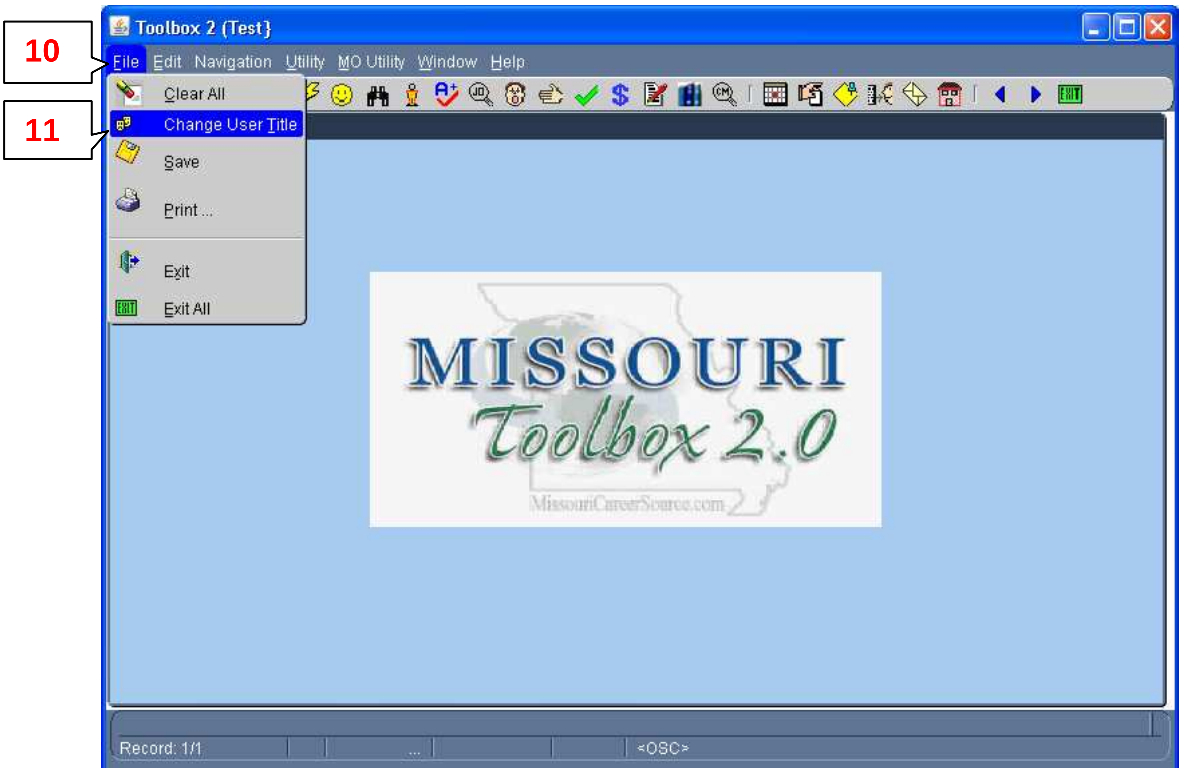


Figure 3: Splash Screen/File Menu/Change User Title Option

10. Click on the File **File** menu
11. Select **Change User Title**. A Change Agent Hat screen will pop-up.

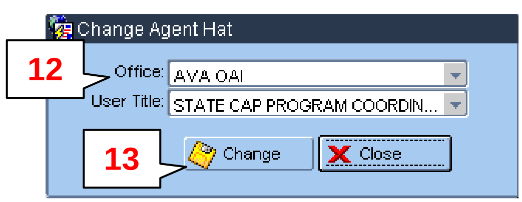


Figure 4: Change Agent Hat Screen

12. Change the **Office** field to match the Primary Counselor's location.
13. Click the Change button to change the office location.

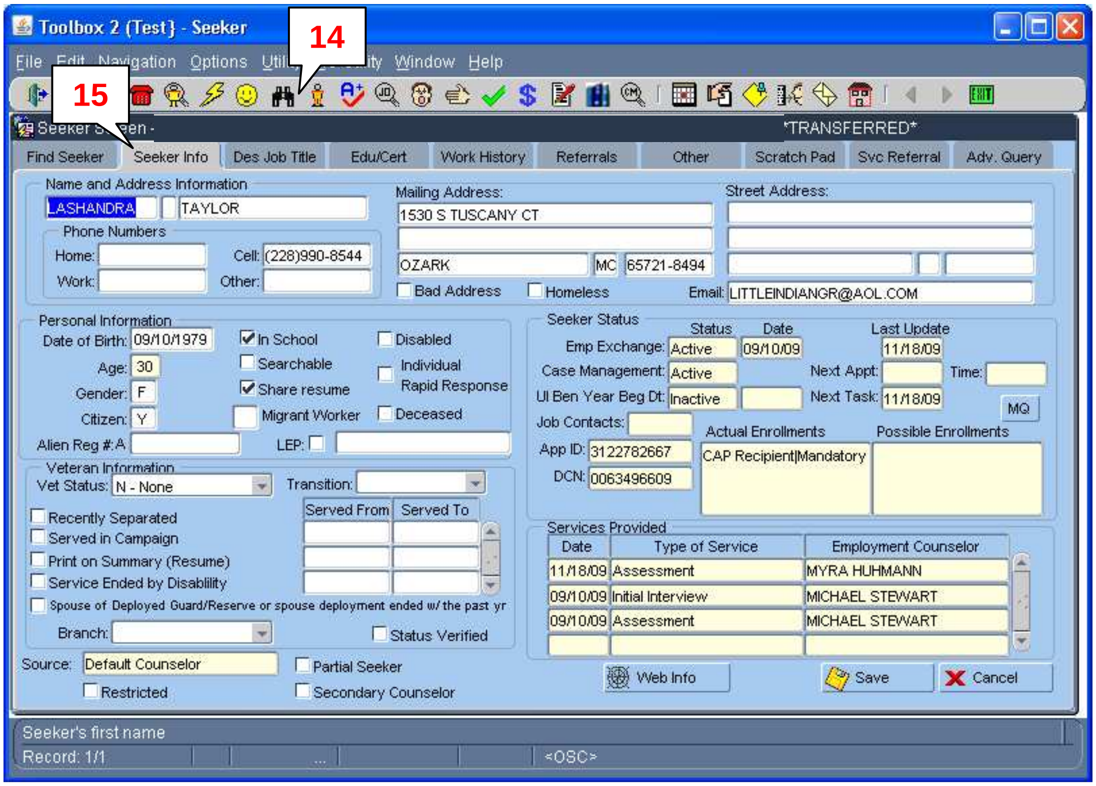


Figure 5: Find Seeker Module/Seeker Info Tab

14. Click the **Find Seeker** icon to access the client's record.
15. Access the **Seeker Info** tab.

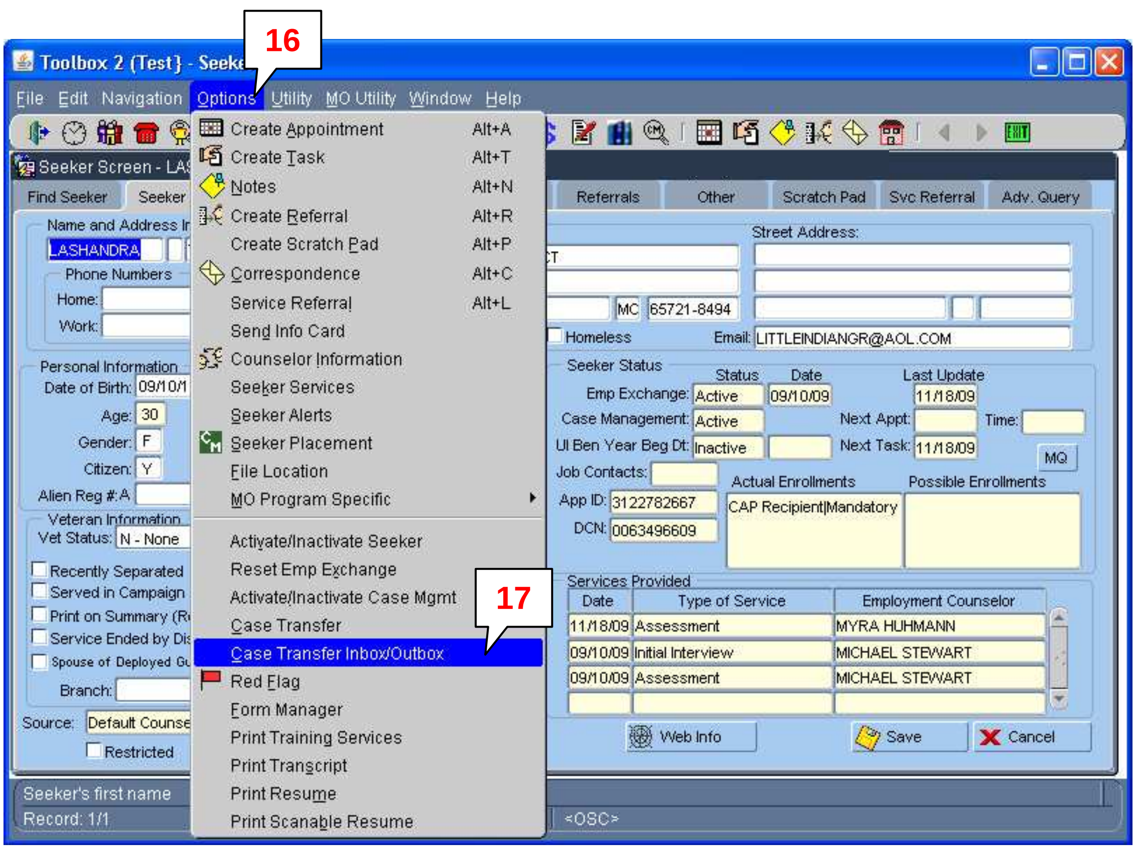


Figure 6: Options Menu/Case Transfer Inbox-Outbox Option

16. Click on the Options **Options** menu

17. Select **Case Transfer Inbox/Outbox**. The Case Transfer Inbox/Outbox screen will appear.

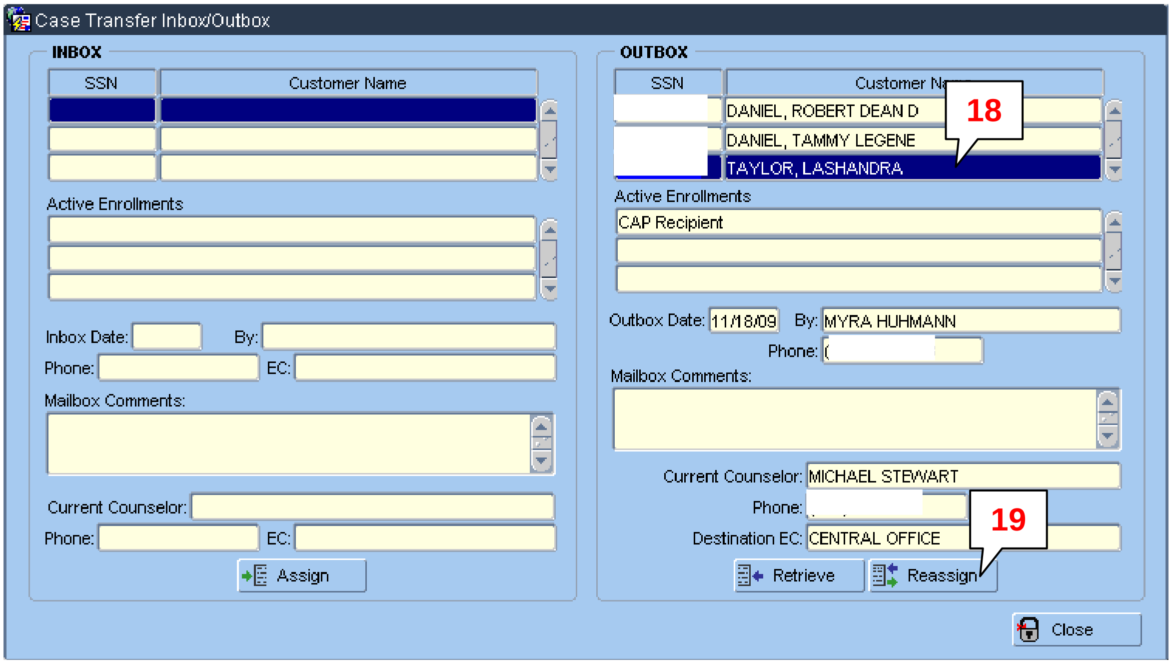


Figure 7: Case Transfer Inbox/Outbox Screen

18. In the **Outbox** section, highlight the client you wish to retrieve.
19. Click the  button to reassign the client's record. A Reassign Case screen will pop-up.

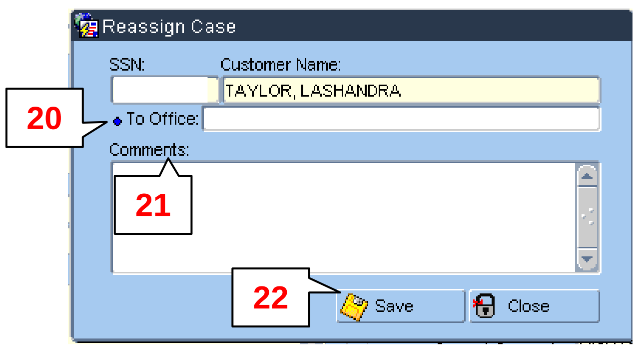


Figure 8: Reassign Case Screen

20. The **To Office** field will allow you to select a different location to transfer the case to. Double-click for a list of locations.
21. After a location is selected, add any necessary information into the **Comments** field.
22. Click the  button. You will receive a confirmation message.

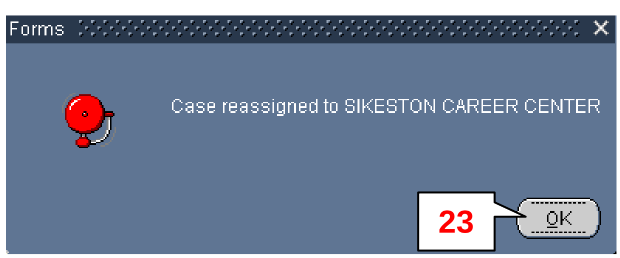


Figure 9: Forms Message

23. Click the  button.

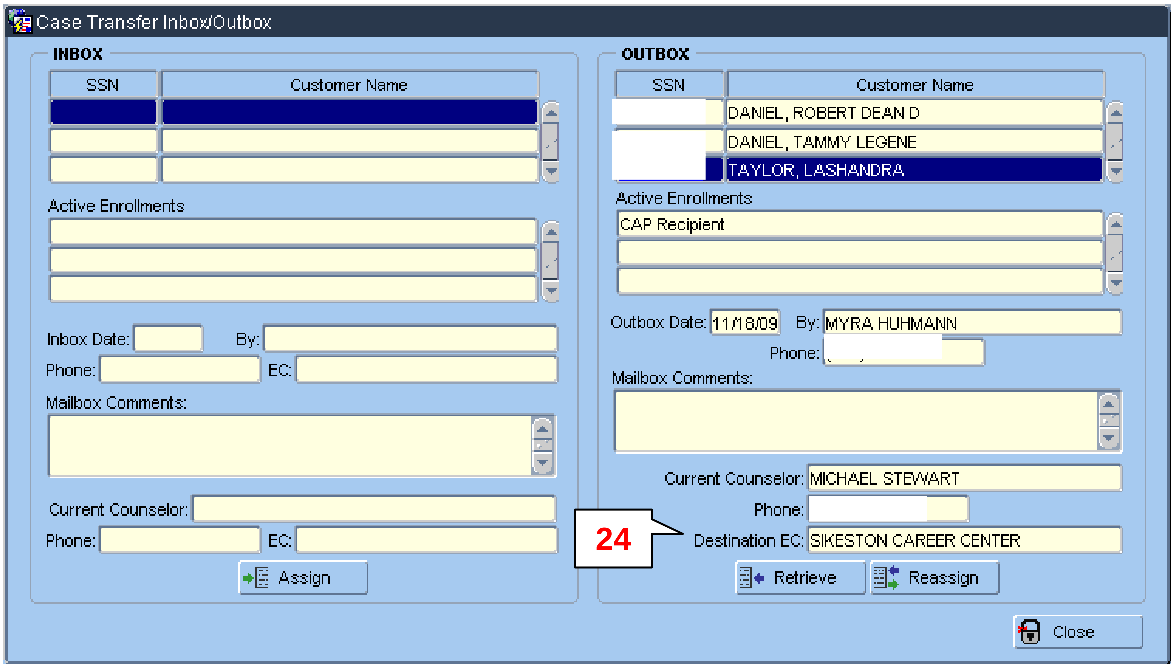


Figure 10: Case Transfer Inbox/Outbox Screen

24. The **Destination EC** field will reflect the new location the case has been transferred to.

Reassigning a Task

Reassigning a task to another counselor.

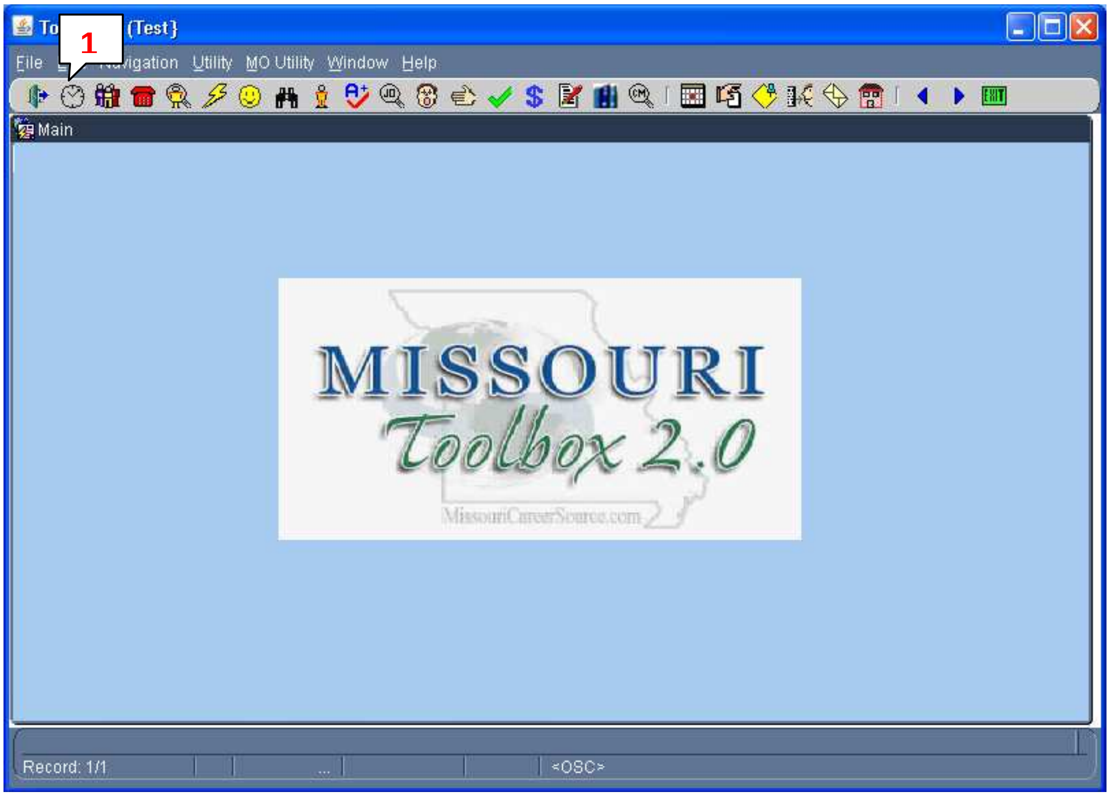


Figure 1: Daily Schedule Module

Step-by-Step:

1. Click on the **Daily Schedule** icon.

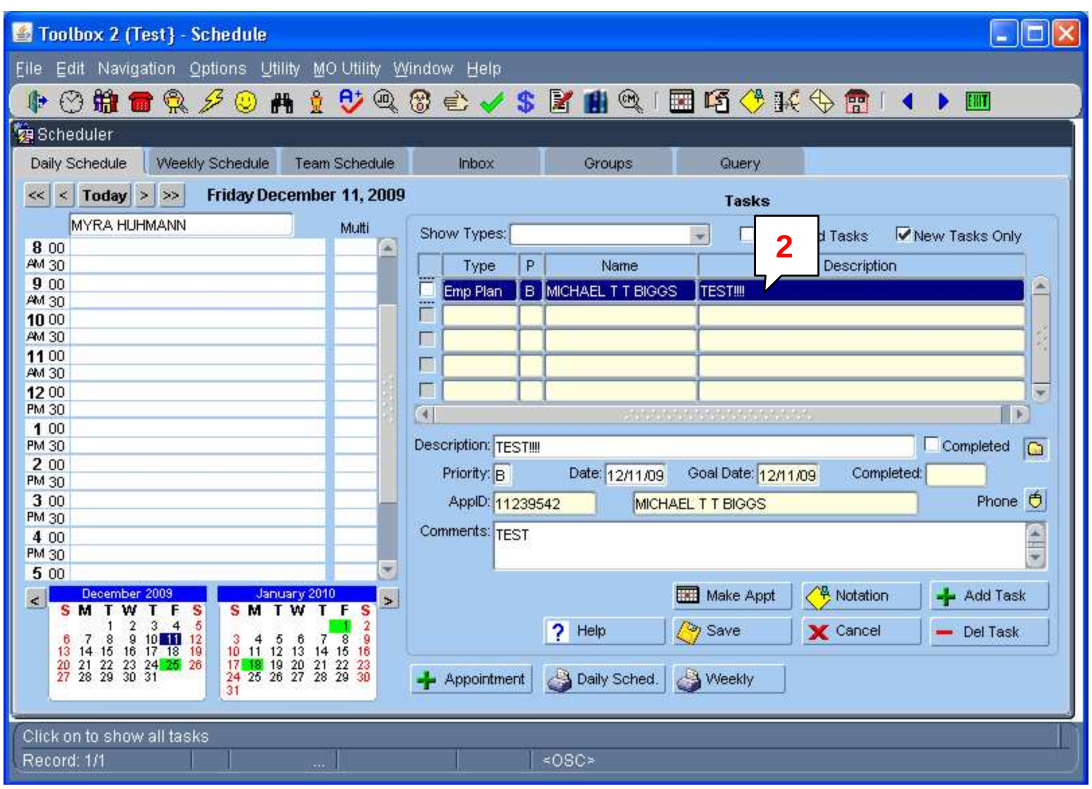


Figure 2: Scheduler Screen

2. Double click on the task you want to transfer.

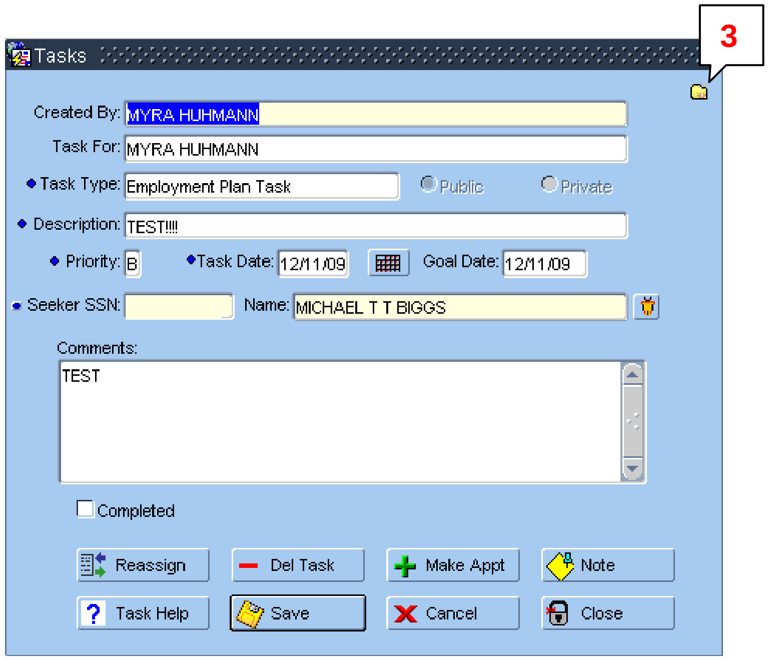


Figure 3: Tasks Screen

3. Click the icon to open the client's record.

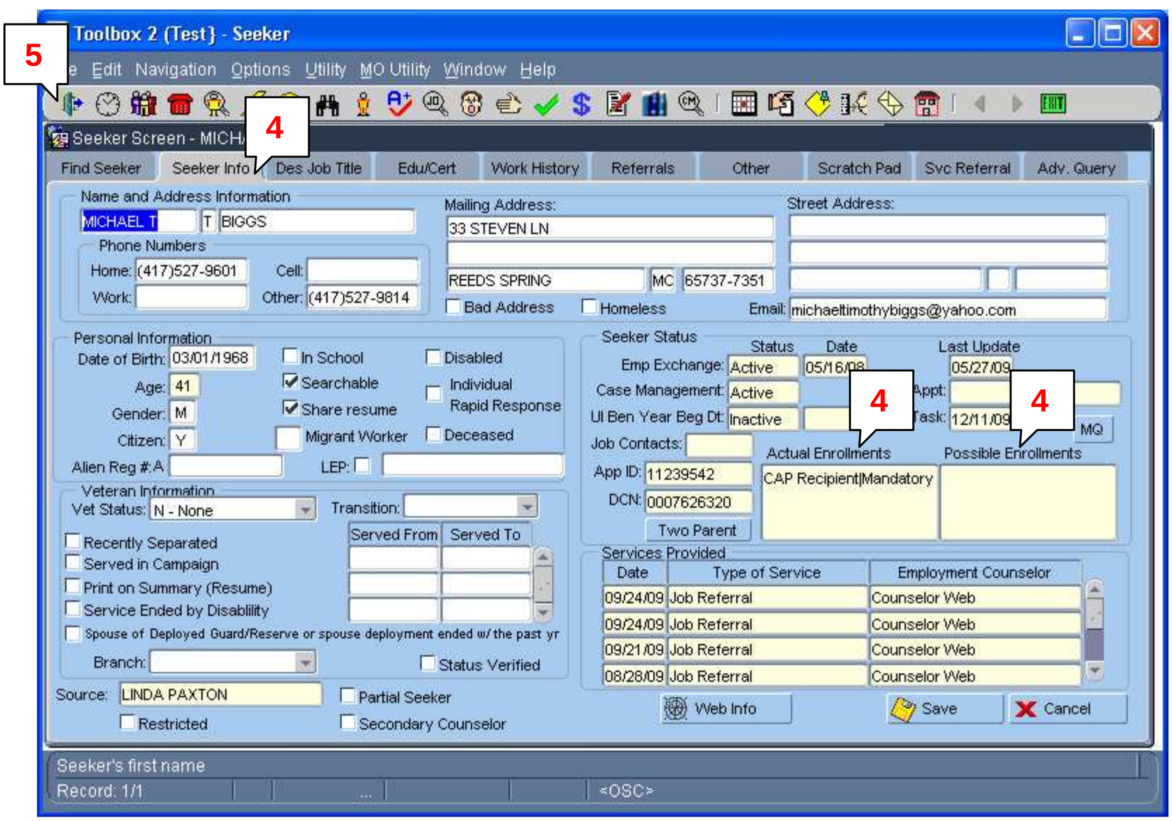


Figure 4: Find Seeker Module/Seeker Info Tab

4. On the **Seeker Info** tab, review the **Actual** and **Possible Enrollments** to determine the appropriate staff person for assignment.
5. Click the button to close the client's record and return to the **Daily Schedule**.

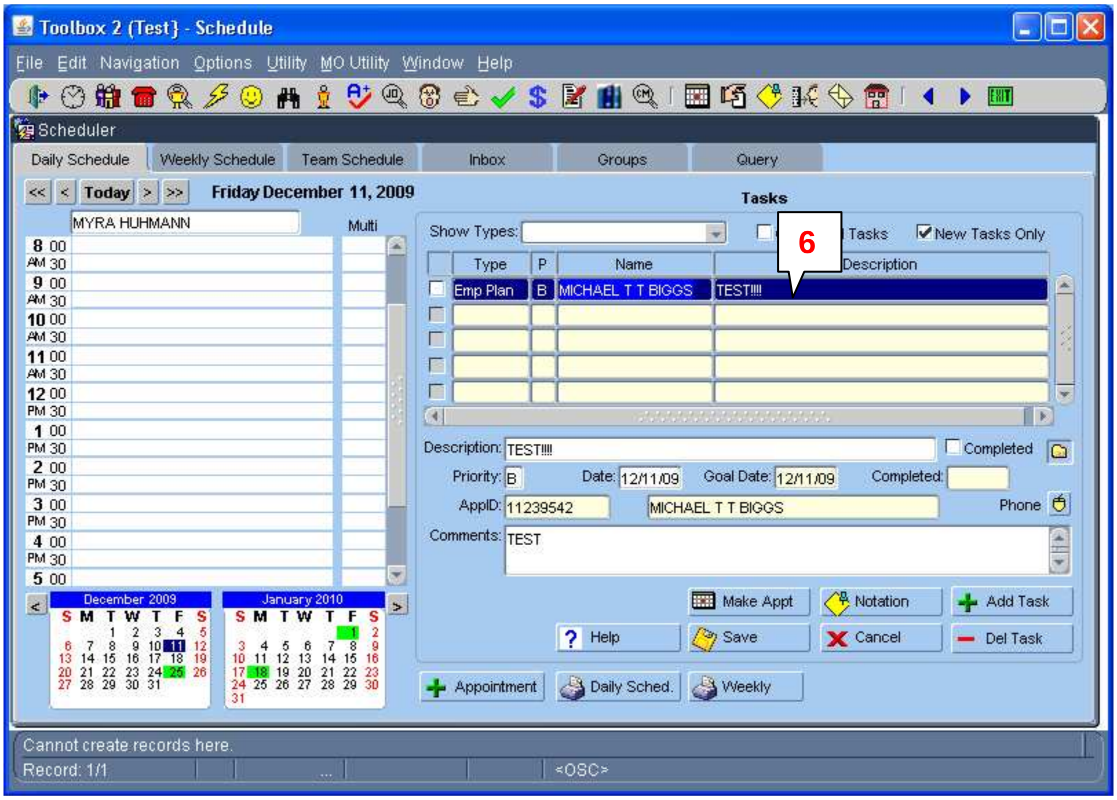


Figure 5: Scheduler Screen

6. Double click on the task you want to transfer.

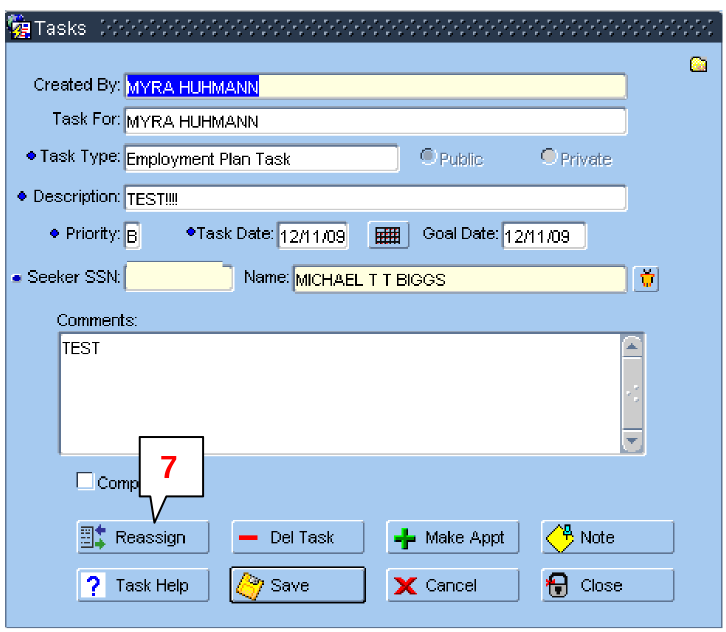
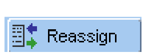


Figure 6: Tasks Screen

7. Click the 

button.

Figure 7: Reassign Tasks Screen

8. Double click in the **Assign to:** field for a list of counselors.

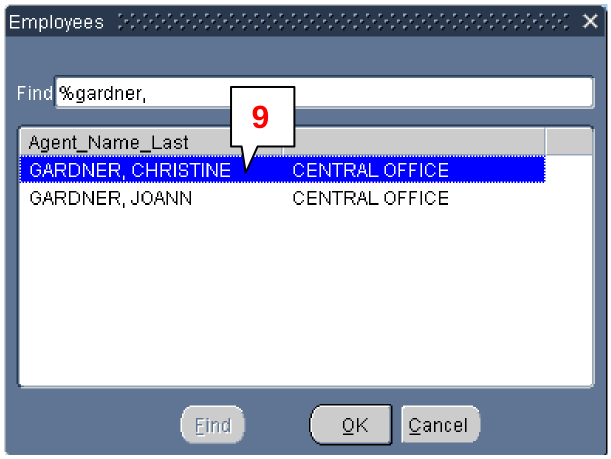


Figure 7: Employees Screen

9. Select the counselor you wish to reassign the task to.

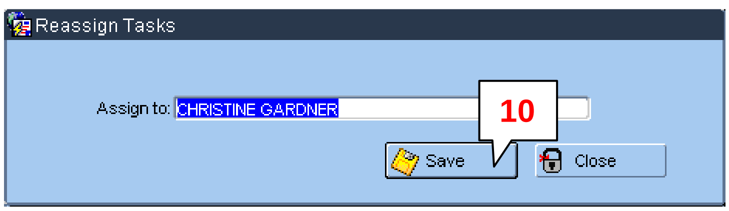


Figure 9: Reassign Tasks Screen

10. Click the 

button to reassign task, close screen, and return to the **Scheduler**.

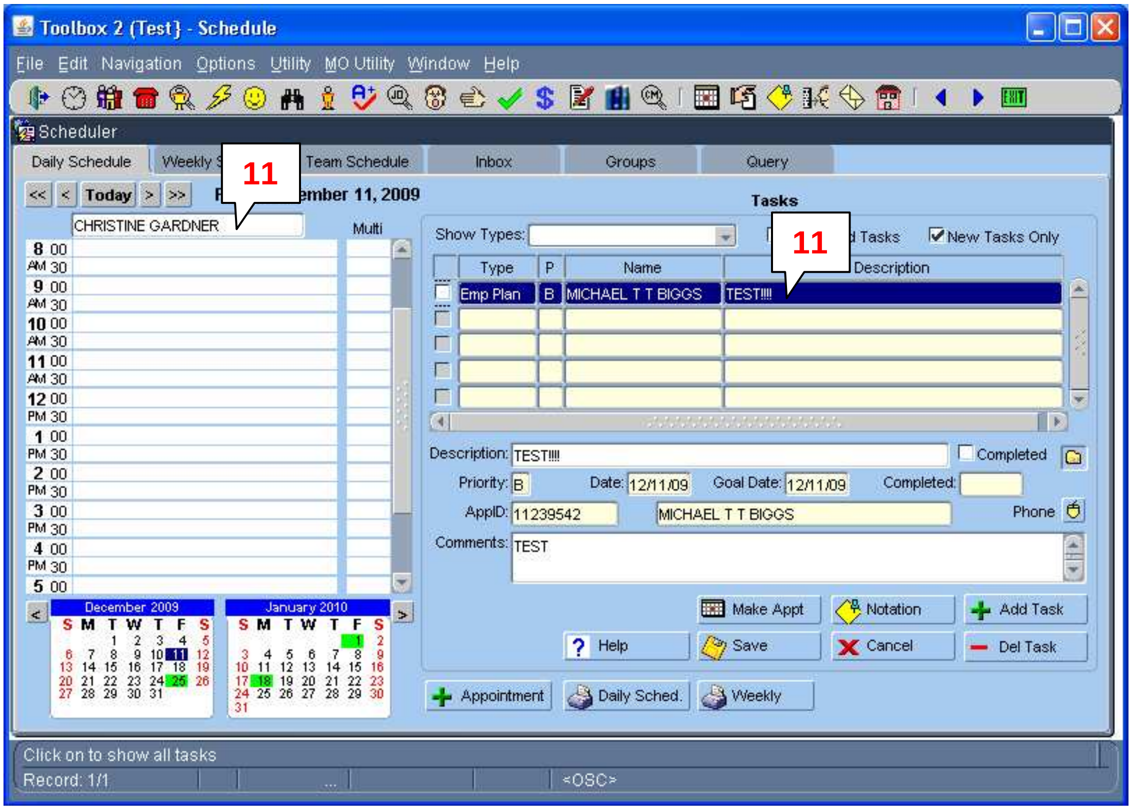


Figure 10: Scheduler Screen

11. You can review the designated counselor's schedule to verify that task was reassigned.

Case Notes

Entering/adding a case note.

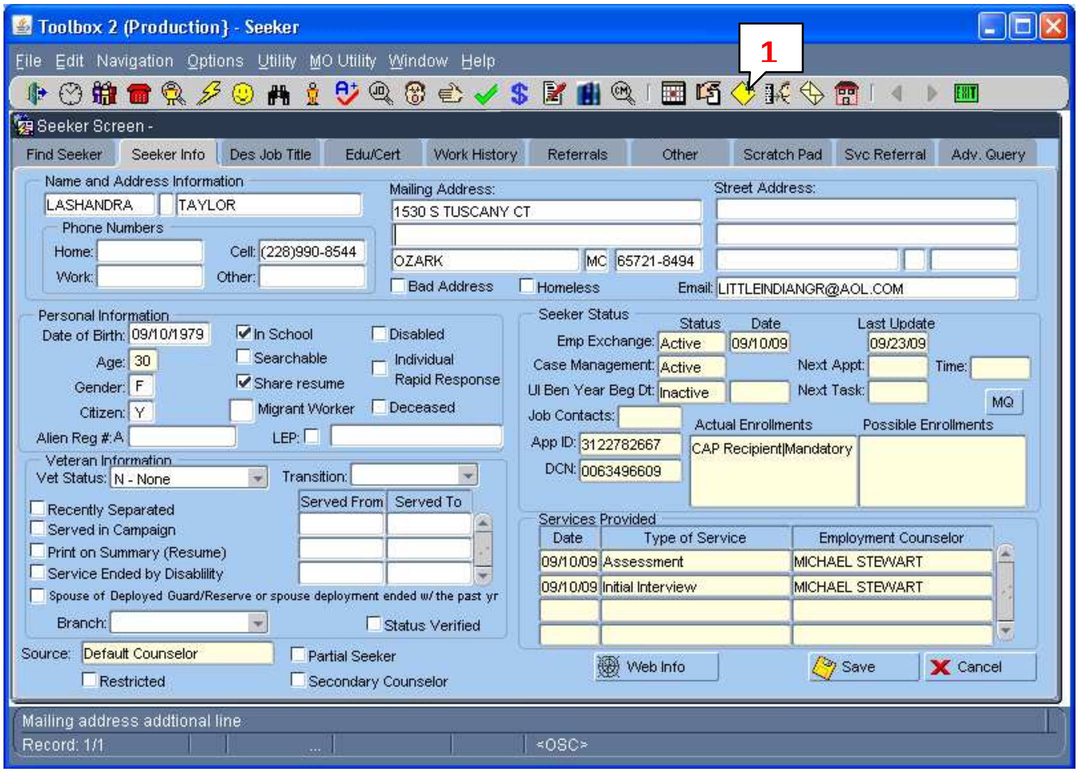


Figure 1: Notes Module

Step-by-Step:

1. With a client's record open, click on the **Notes** icon and the **Notes for Seeker** screen will pop-up.

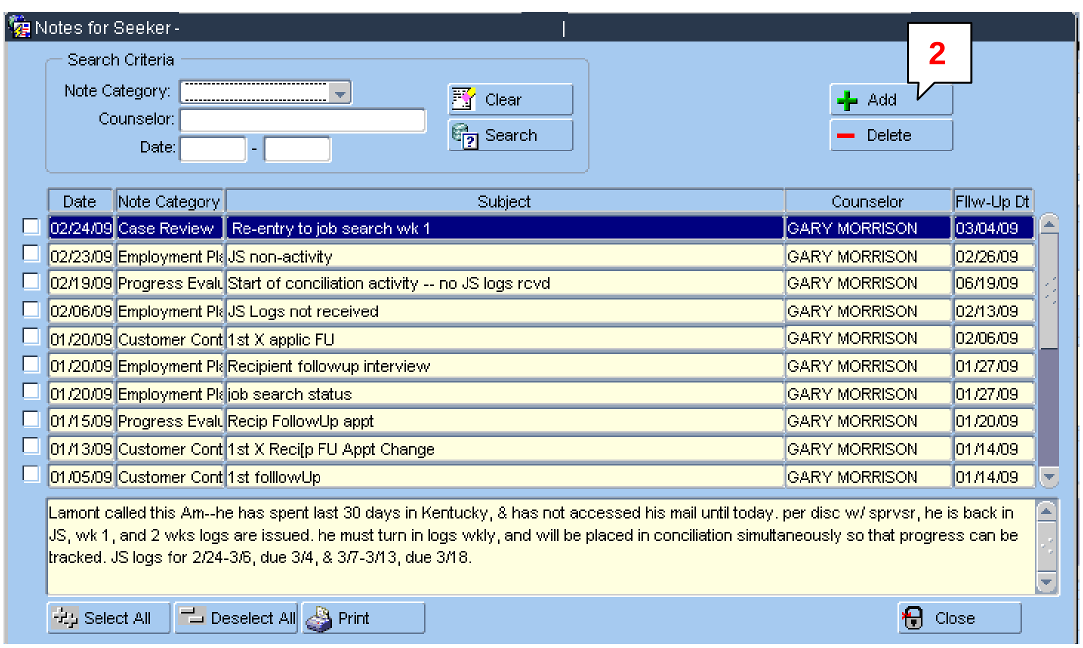


Figure 2: Notes for Seeker Screen

2. Click on the Add button and the **Create Note for Seeker** screen will pop-up.

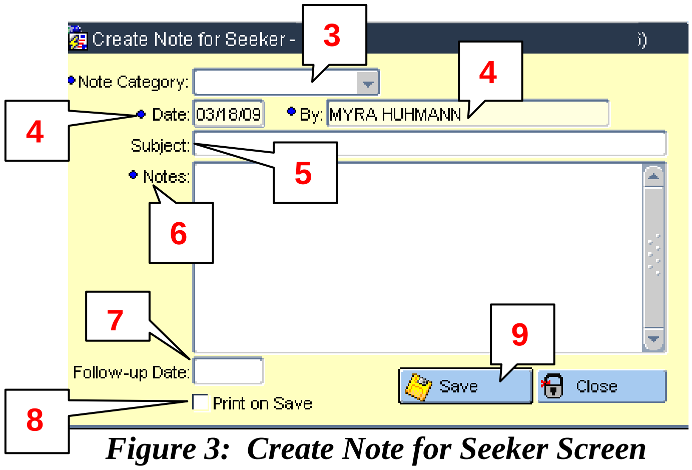
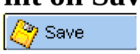


Figure 3: Create Note for Seeker Screen

3. In the **Note Category** field, select a note type from the drop-down menu.
4. The **Date** and **By** fields will auto populate with current date and counselor.
5. Enter a subject into the **Subject** field.
6. In the **Notes** field, enter a case note. **REMINDER:** Do not include abbreviations, information related to domestic violence or medical history, etc.
7. A date can be entered into the **Follow-up Date** field. Entering a date into this will place a task on your **Daily Schedule**.
8. Check the **Print on Save** field if you would like a copy of the case note for the client's file.
9. Click on the  button to save and close the screen.

Case Notes

Deleting a case note. A case note can be deleted by the case manager who entered it up to 4:00pm the same day it was issued.

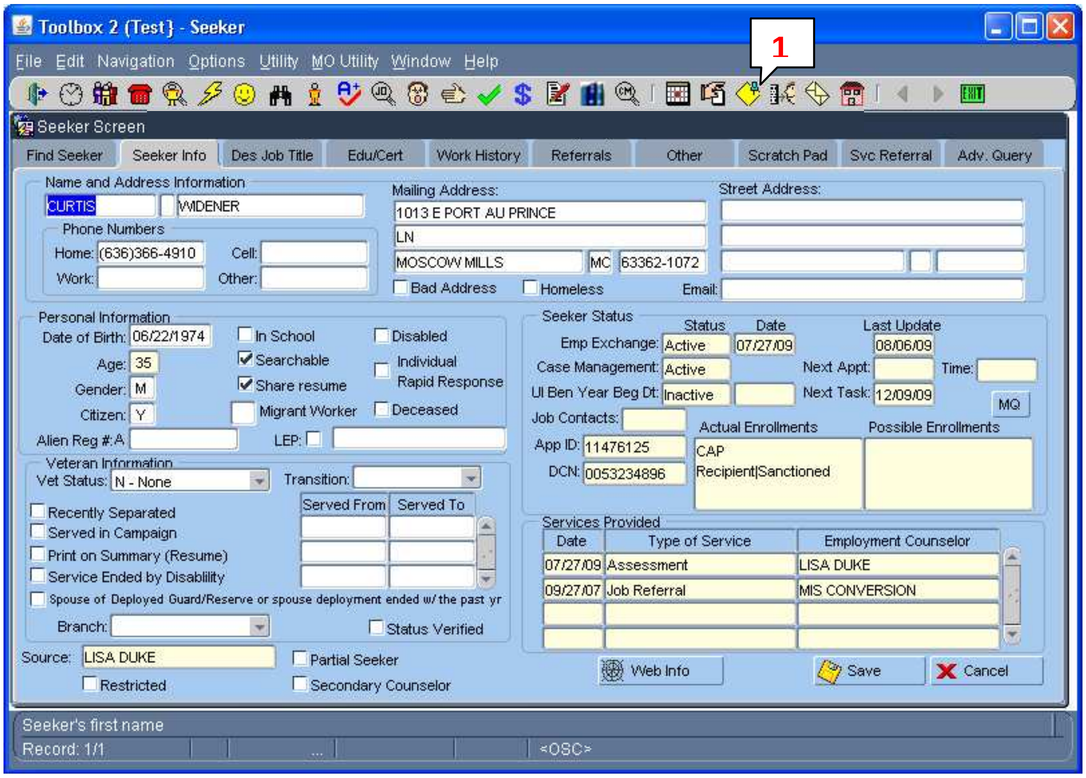


Figure 1: Notes Module

Step-by-Step:

1. With a client's record open, click on the  **Notes** icon and the **Notes for Seeker** screen will pop-up.

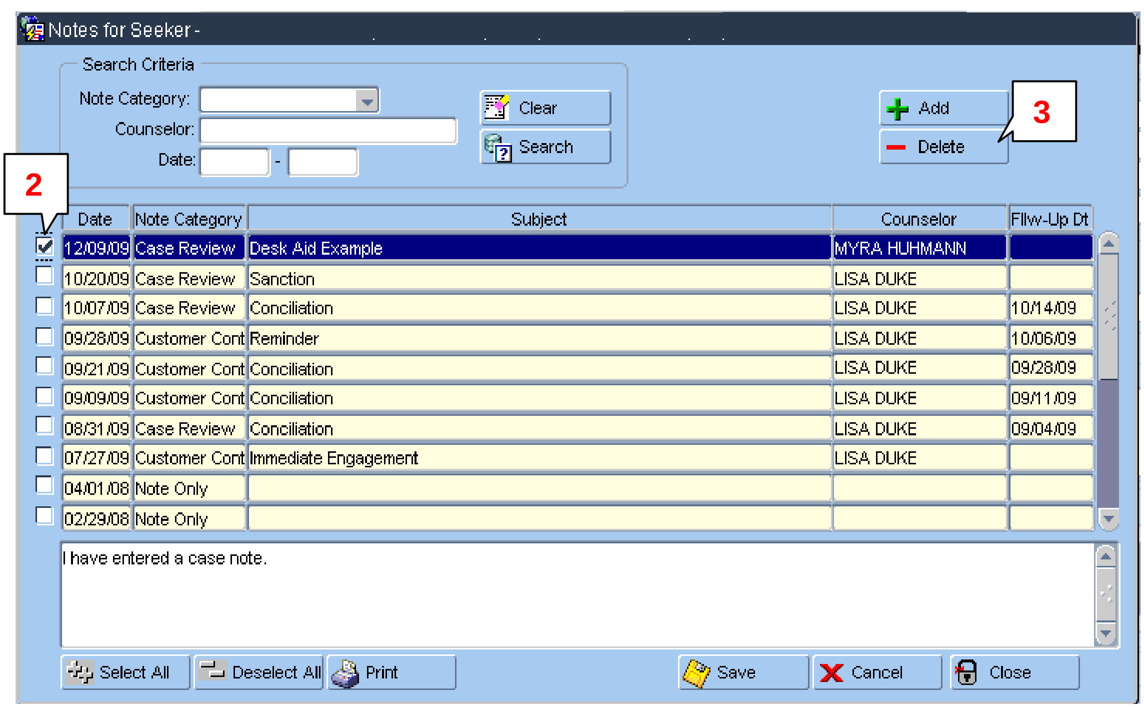


Figure 2: Notes for Seeker Screen

2. Select the case note you want to delete.
3. Click on the 

button to delete the case note.

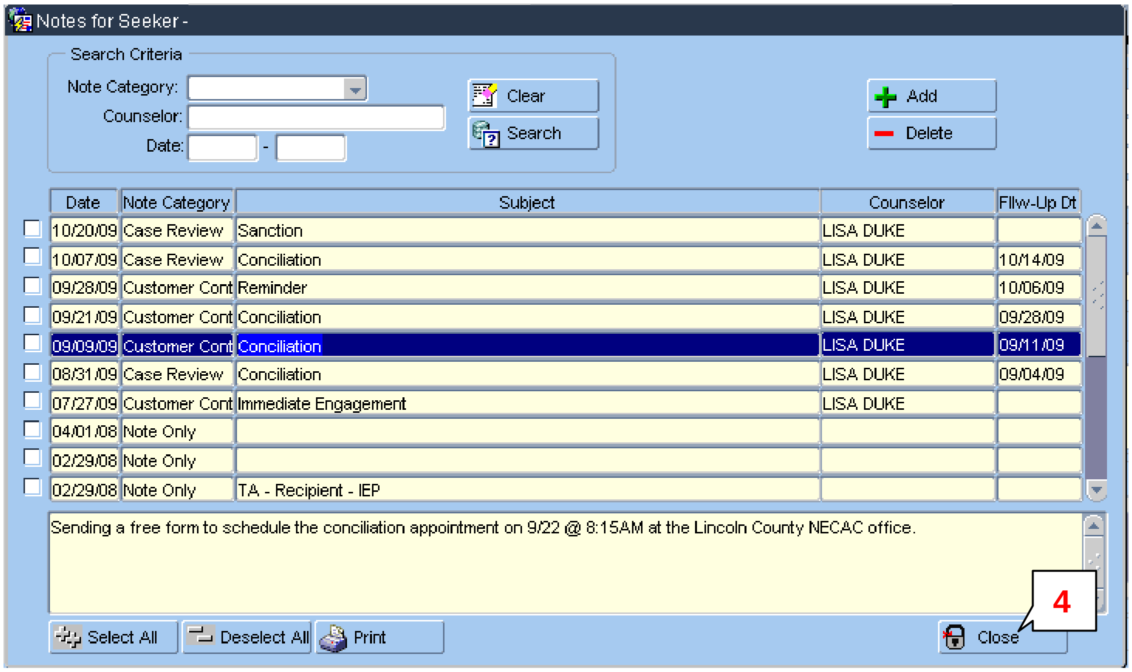
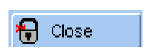


Figure 3: Notes for Seeker Screen

4. Close the **Notes for Seeker** screen by clicking on the 

button.

Case Notes

Editing a case note. A case note can be edited by the case manager who entered it up to 4:00pm the same day it was issued.

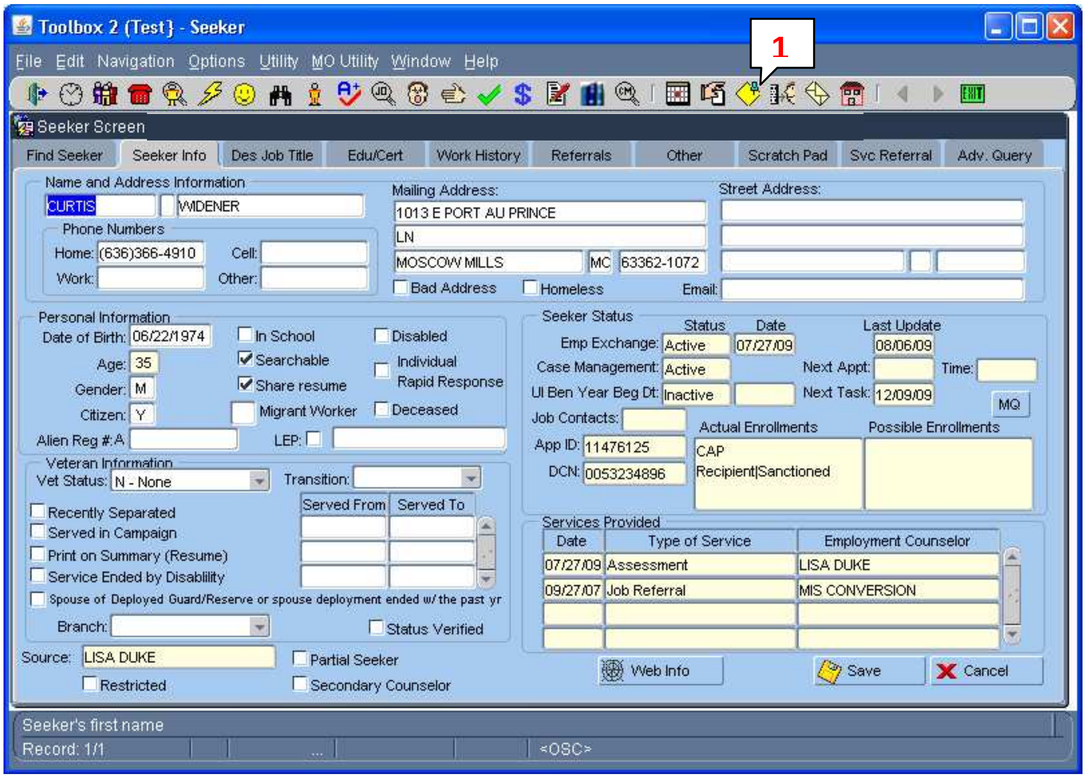


Figure 1: Notes Module

Step-by-Step:

1. With a client's record open, click on the  **Notes** icon and the **Notes for Seeker** screen will pop-up.

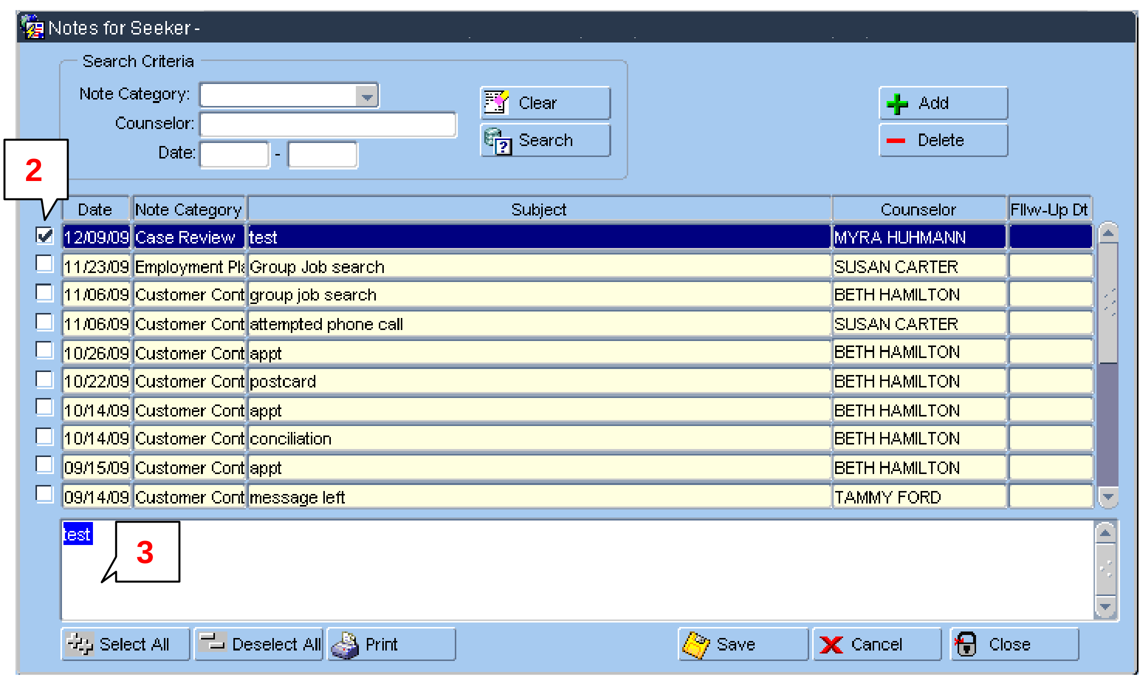


Figure 2: Notes for Seeker Screen

2. Select the case note you want to edit.
3. Double click in the text portion of the case note and the **Editor** screen will pop-up.

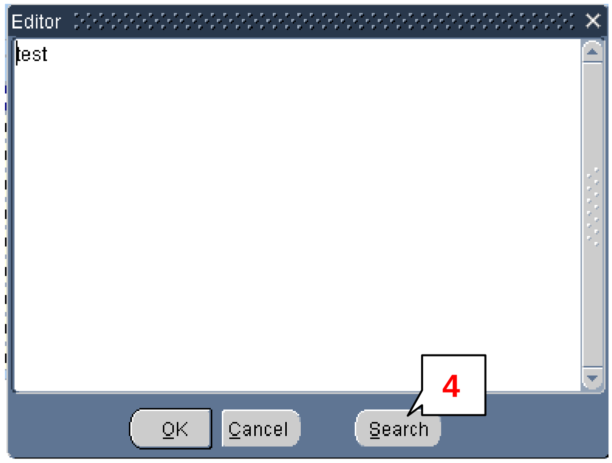


Figure 3: Editor Screen

4. Click on the  button and a **Search/Replace** screen will pop-up.

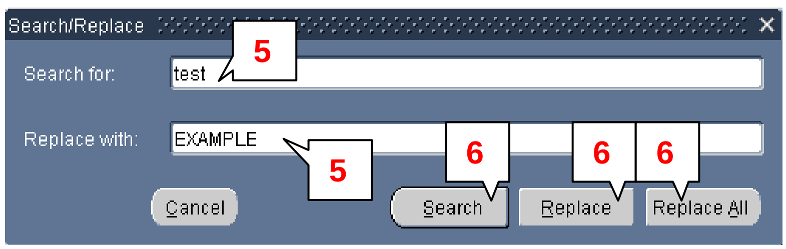


Figure 4: Search/Replace Screen

5. Enter the appropriate text in the **Search for:** field and **Replace with:** field.
6. Press the  button and then either the  button or the  button to correct the text.

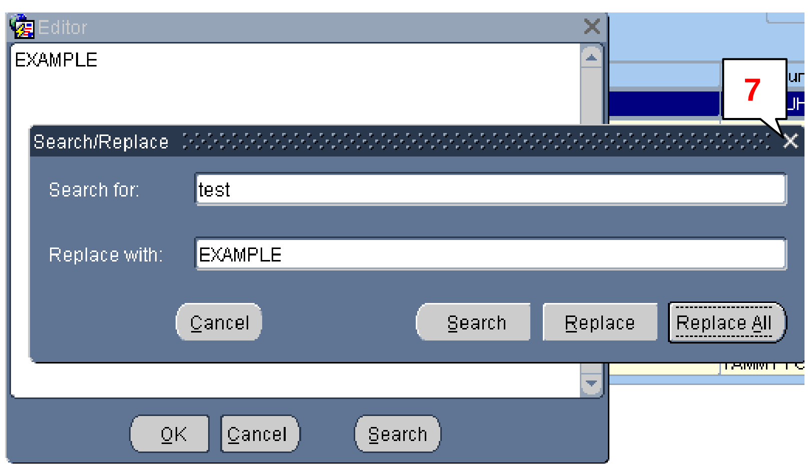


Figure 5: Search/Replace Screen and Editor Screen

7. When finished, press the  in the upper right corner to close the **Search/Replace** screen.

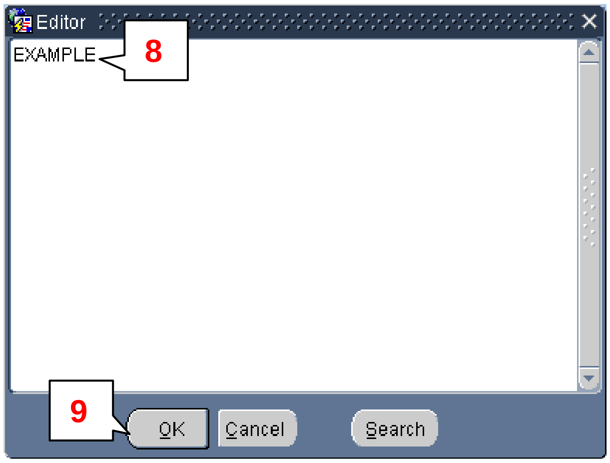


Figure 6: Editor Screen

8. The **Editor** screen will now display the corrected text.
9. Press the  button to close the screen.

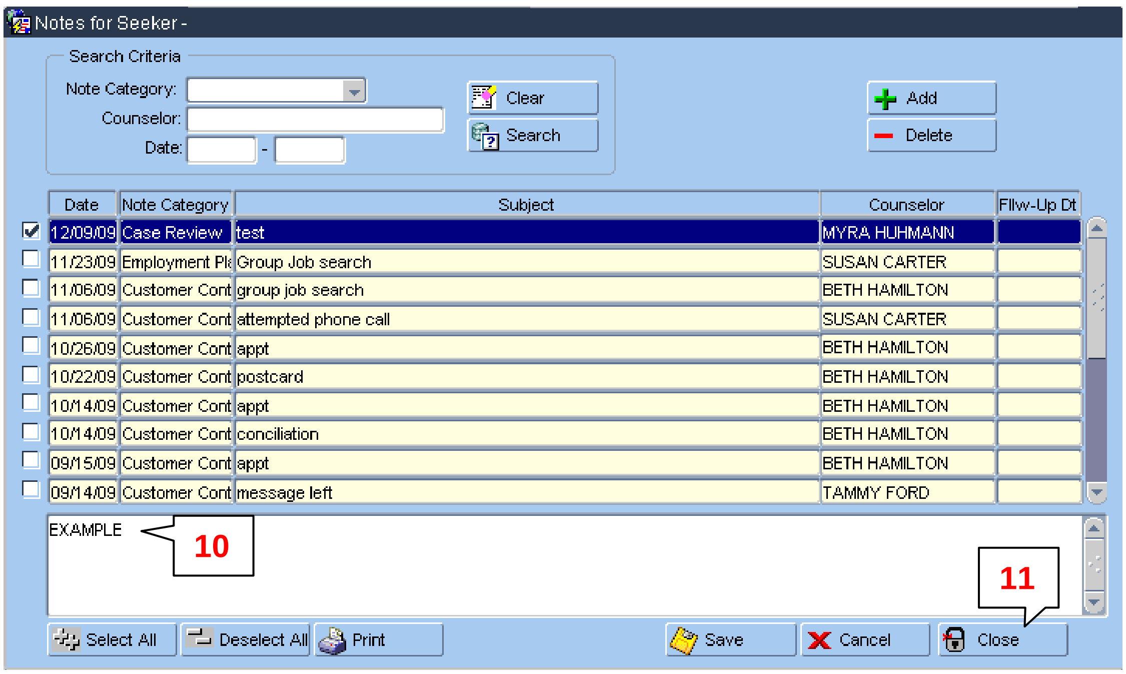
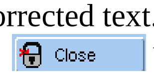


Figure 7: Notes for Seeker Screen

10. The **Notes for Seeker** screen will now display the corrected text.
11. Close the **Notes for Seeker** screen by clicking on the  button.

Employment Plan

Printing the Employment Plan. [Information regarding the ONet, Goal, Justification, and Service fields can be found under **Services**.]

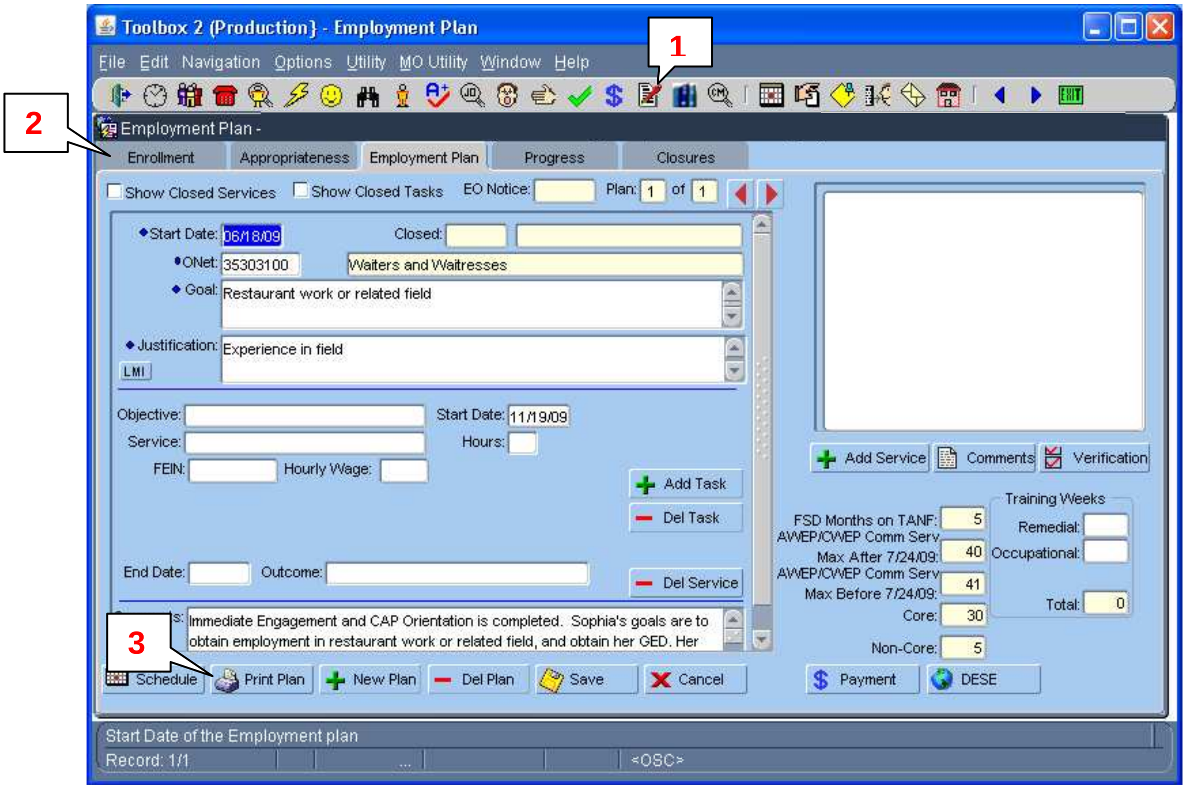


Figure 1: Employment Plan-Enrollment Module/Employment Plan Tab

Step-by-Step:

1. Click on **Employment Plan/Enrollment** icon.
2. Access the **Employment Plan** tab.
3. When all required information is entered, click on the Print Plan button to print the Employment Plan.
4. Review the Employment Plan with the client.
5. The client is required to sign the Employment Plan.

Enrollment

Enrolling a client into CAP.

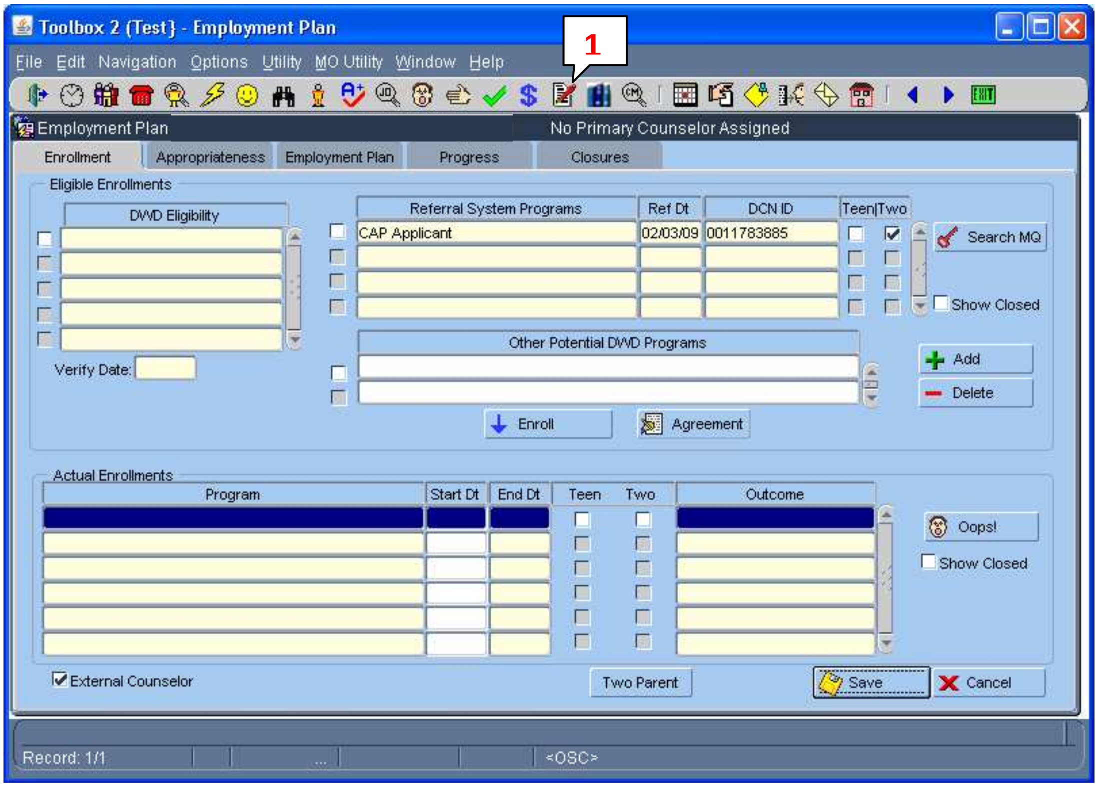


Figure 1: Employment Plan-Enrollment Module/Enrollment Tab

Step-by-Step:

1. Click on **Employment Plan/Enrollment** icon.

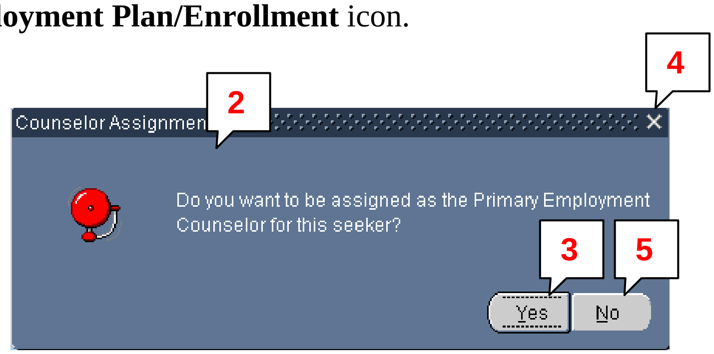


Figure 2: Counselor Assignment Screen

2. If a counselor has not been assigned to the client's record, a **Counselor Assignment** screen will pop-up with the question 'Do you want to be assigned as the Primary Employment Counselor for this seeker?'.
3. If you will be the primary counselor, click **Yes**.
4. If you will not be the primary counselor and you do not want to assign another person as primary counselor, click the **x** in the top right corner of the screen. If you will not be the primary counselor and you do want to assign another person as a counselor, click **No** to assign a person as the primary counselor.

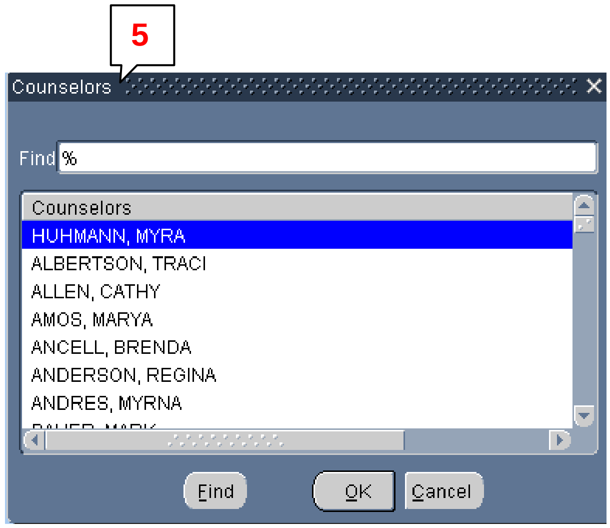


Figure 3: Counselor Screen

5. If you click **No**, a list of possible counselors will appear.

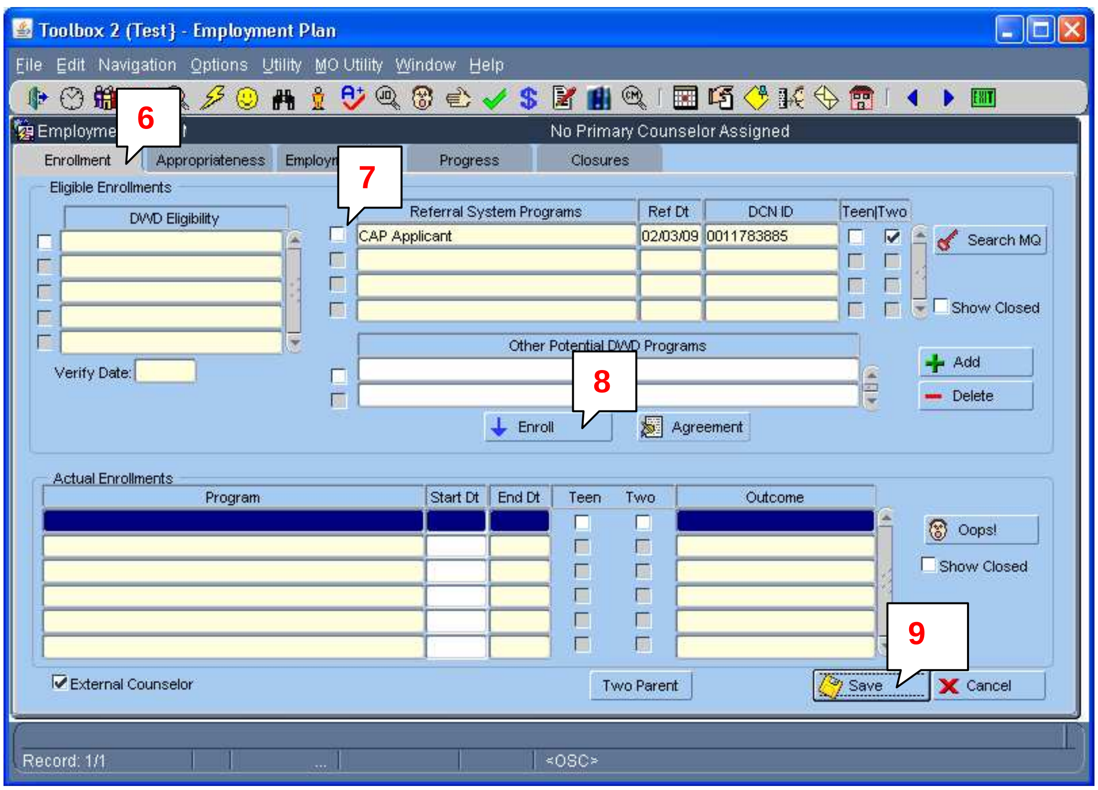
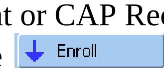


Figure 4: Counselor Screen

6. Select the **Enrollment** tab.
7. Under the section **Referral System Programs**, check/click the field to the left of the CAP Applicant or CAP Recipient referral.
8. Click the  button to enroll the client into the CAP program. The referral will move from the **Referral System Programs** section to the **Actual Enrollments** section.
9. Click on the  button to save the enrollment.

FSD Load Information Tab

The ‘FSD Load Information’ tab contains information from the “FSD Daily File” so the case manager can see the history of referrals including the date of referral, recipient contact information, work status, parent type, FSD Eligibility specialist and phone number, and grant information.

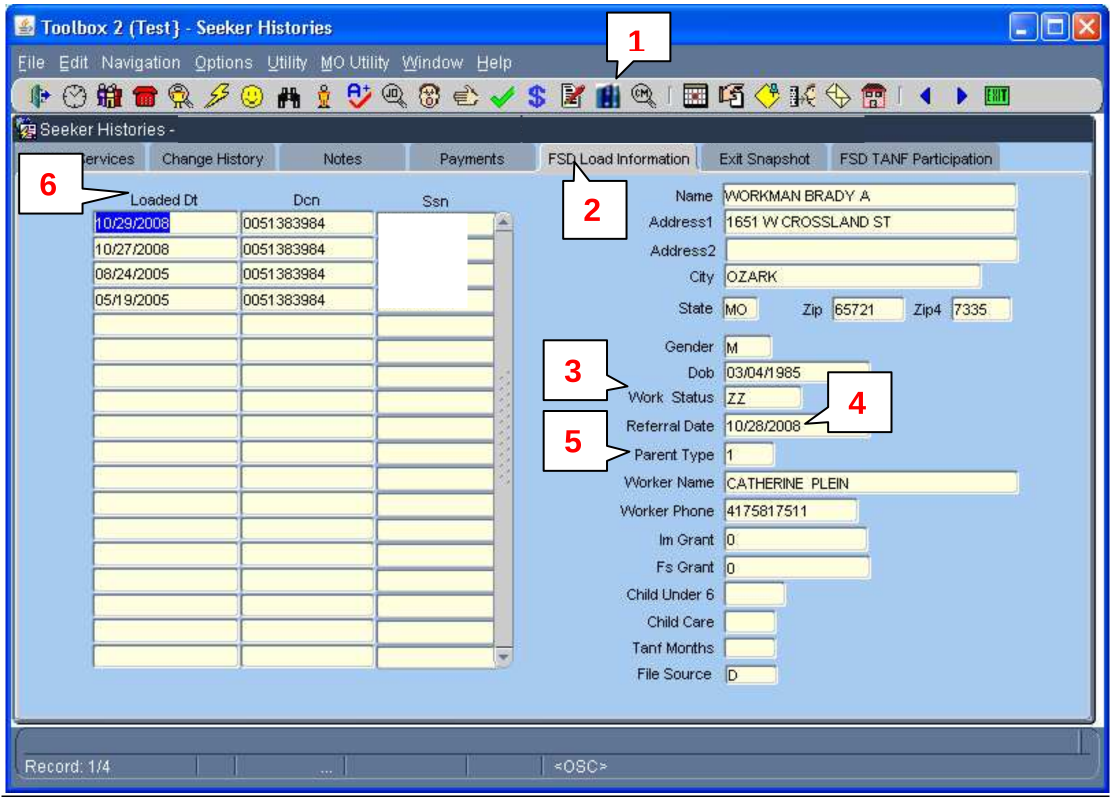


Figure 1: Seeker History Module/FSD Load Information Tab

Step-by-Step:

1. Click on the  **Seeker History** icon.
2. Click on the **FSD Load Information** tab.
3. The **Work Status** field indicates whether a client is an Applicant (**AA**), Mandatory (**DD**), Sanctioned (**SS**), Voluntary (**WW**), or if the client’s case is Closed (**ZZ**).
4. The **Referral Date** is the date new information was electronically sent from FSD to DWD in the overnight batch.
5. **Parent Type** determines if the client is a Single Parent household (**1**) or a Two Parent household (**2**). If a **1** shows in this field for a Two Parent household, one of the parents met an exclusion at FSD prior to being referred to DWD.
6. The **Loaded Dt** is the date the information was loaded into Toolbox 2.0. Unless there is a problem loading the file, this date should be the business day following the **Referral Date**.

FSD TANF Participation Tab

The 'FSD TANF Participation' tab displays the federal work participation rate data sent to the Department of Health and Human Services (HHS). This information is used to: determine the core and non-core hours, AWEP/CWEP maximum hours, and Community Service maximum hours displayed on the 'Employment Plan' tab; reflects the work participation rate status for the month; and display time-limited information activity information.

This screen is populated from the TANF Data Reporting (TDR) file which is loaded monthly. If the screen is blank, the TDR has not yet been loaded. This will cause the Core and Non-Core hours, as well as the AWEP/CWEP-Community Service hours, to calculate incorrectly on the Employment Plan.

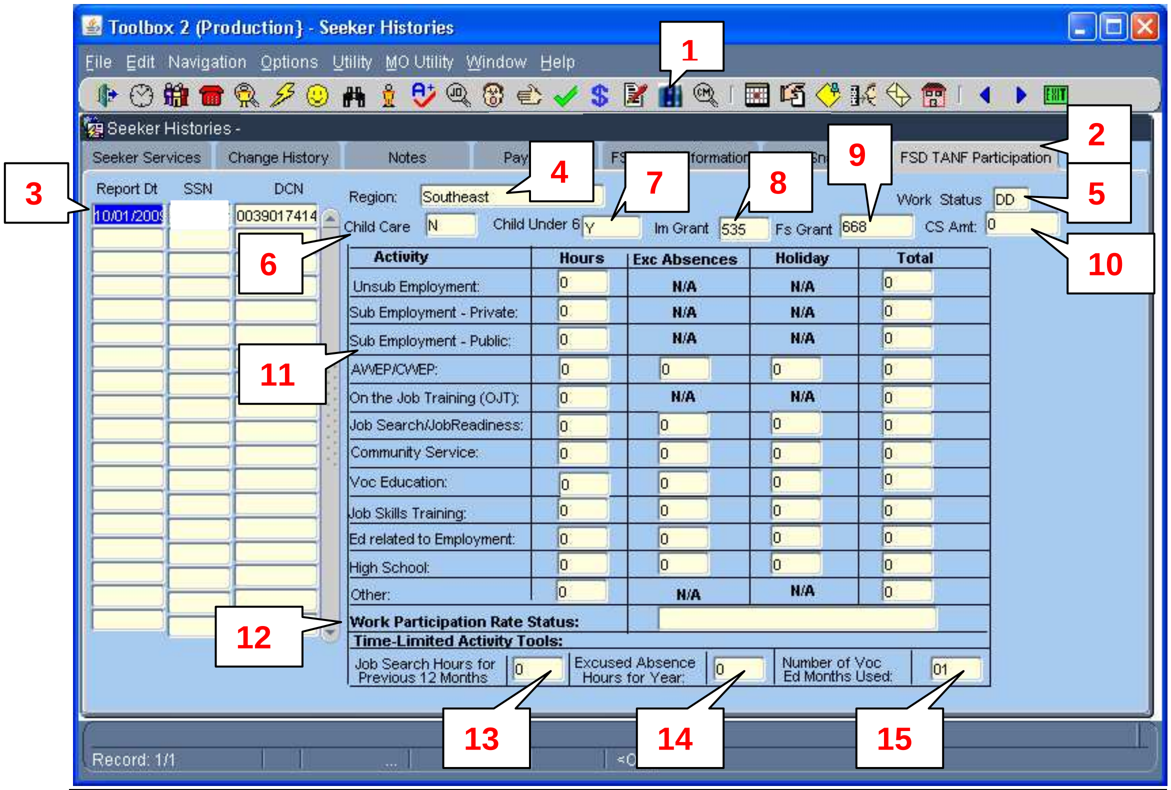


Figure 1: Seeker History Module/FSD TANF Participation Tab

Step-by-Step:

7. Click on the Seeker History icon.
8. Click on the **FSD TANF Participation** tab.
9. The **Report Dt** field indicates the date the of the latest federal work participation rate data. The report date is always from the month before. For example, if it reflects a date of 10/1/09, that information is for the September 2009 federal month. Therefore, when calculating time-limited activities, remember to include the most recent month that will not be displayed. [As a reminder, it takes approximately 45 days from the end of the month to load the data due to actual hours reporting. For example, the September 2009 will load by November 15, 2009.]
10. The **Region** field indicates which region the client was reported under for the federal work participation rate.
11. The **Work Status** field indicates what work status (AA, DD, SS, or WW) the client was reported under for the federal work participation rate.
12. The **Child Care** field indicates whether or not the household receives federally funded childcare (for a child included in the recipient's TA grant) from the Family Support Division

(FSD). This field is used to calculate the core hours for two-parent households on the 'Employment Plan' tab. Two-parent households with a child under 6 who do not receive federally funded child care are required to complete less core hours than those who receive federally funded child care.

13. The **Child Under 6** field indicates whether or not the household has a child under 6 (that is included in the recipient's TA grant). This information is used to calculate the core hours for single and two-parent households on the 'Employment Plan' tab. Single-parent households with a child under age 6 are not required to complete non-core hours while households with a child 6 and over are required to complete non-core hours. Two-parent households with a child under 6 who do not receive federally funded child care are required to complete less core hours than those who receive federally funded child care.
14. The **IM Grant** field indicates the amount of the recipient's household TA grant.
15. The **FS Grant** field indicates the amount of the recipient's household Food Stamp grant.
16. The **CS Amt** field indicates the amount of child support, if any, that was withheld by FSD due to the client receiving TA.
17. The number included under the **Hours**, **Exc (Excused) Absences**, **Holiday**, and **Total** indicates the number of activity hours reported in the work participation rate data file for each **Activity**.
18. The **Work Participation Rate Status** indicates if the federal work participation rate was met or if the client was in any other activity for the month including 'Assessment', 'Temporary Waiver', or 'Conciliation'.
19. The **Job Search Hours for Previous 12 Months** indicates the number of job search/ job readiness hours the recipient has used for the previous 12 months. The maximum hours is 240 hours for recipients with a 20 hour federal requirement and 360 hours for recipients with a 30 hour federal requirement and greater.
20. The **Excused Absence Hours for Year** indicates the number of excused hours the client has used for the year. Recipients are allowed up to 16 excused absence hours per month and 80 excused absence hours within the previous 12-month period.
21. The **Number of Voc Ed Months Used** indicates the number of 'Vocational Education and Training' activity months used. Recipients are allowed up to 12 months lifetime in 'Vocational Education and Training'.

NOTE: 'Job Search/Job Readiness' activity hours, 'Vocational Education and Training' months, and excused absence hours are only counted if the recipient meets full participation for the month. If full participation is not met, these activity hours are reported in an "Other" category.

AWEP/CWEP, Community Service, and Core/Non-Core Hours Calculated

Data from the FSD TANF Participation tab is used to calculate the AWEP/CWEP and Community Service Program hours as well as the Core / Non-Core hours on the Employment Plan module.

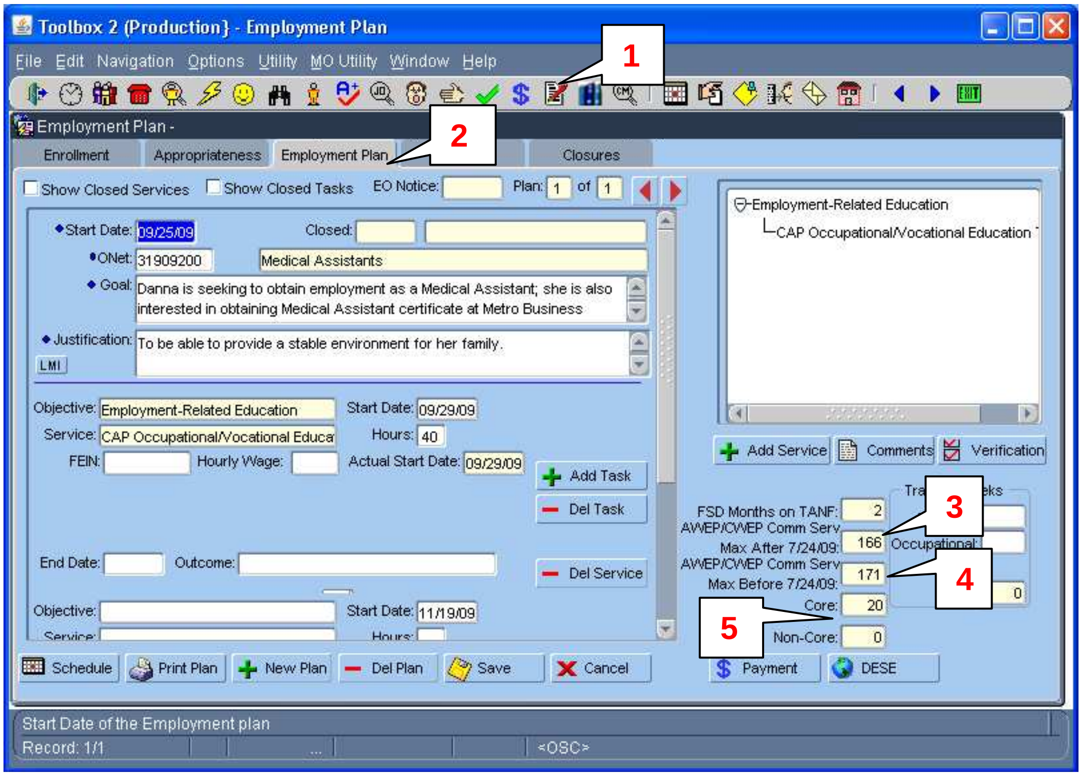


Figure 1: Employment Plan-Enrollment Module/Employment Plan Tab

1. Click on  **Employment Plan/Enrollment** icon.
2. Click on **Employment Plan/Enrollment** tab.
3. Maximum AWEP/CWEP and Community Service hours after 7/24/09 for the month will display.
4. Maximum AWEP/CWEP and Community Service hours before 7/24/09 for the month will display.
5. The required core and non-core hours display. Please note these hours are the federally required hours not to sanction. To pay TRE, an increased amount of core hours for single-parent households is required. These hours are not the hours that should be communicated to the TA recipient.

Generic O*Net Code

The generic O*Net code of 10-0000.00 is only used when an enrolled CAP Recipient has not completed an Employment Plan and/or the O*Net code is not entered on conversion records.

Below are examples of when to use this code:

- When a two-parent household is referred to CAP for Immediate Engagement and only one parent complies - Enter the conciliation service as soon as you have determined that Parent #2 has not come in to participate. If there is no record of Parent #2 in the Missouri Career Source system, Toolbox 2.0 will prompt you to enter an O'NET code on the Employment Plan. It is then appropriate to enter the "default" O'NET.

- If the record is a conversion record from Toolbox 1.0 and meets the criteria above – the "default" O'NET code should already be entered on the Employment Plan. If not, it is appropriate to use this code.

In the *Goal* and *Justification* boxes (which are required fields) on the Employment Plan, simply enter "conciliation" in both boxes; (replace the word 'Converted' with 'conciliation' for conversion records). This will be a reminder to whoever is working with that individual of the Recipient's current status. When the customer comes in to comply, you will know to change the information in the boxes, as it no longer applies.

Entering the generic O*Net code (in situation described above).

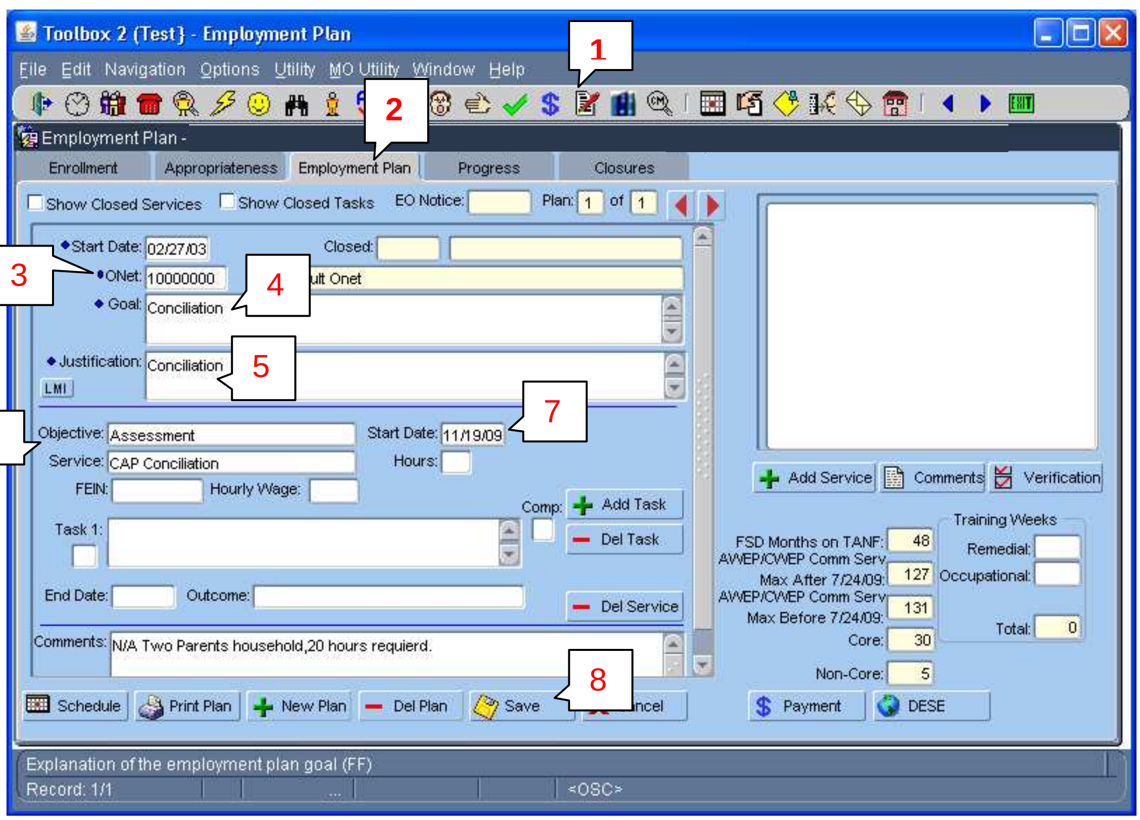


Figure 1: Employment Plan-Enrollment Module/Employment Plan Tab

Step-by-Step:

1. Click on **Employment Plan/Enrollment** icon.
2. Click on the **Employment Plan** tab.

3. Enter ‘10000000’ into the **ONet** field.
4. In the field **Goal**, enter ‘Conciliation’.
5. In the field **Justification**, enter ‘Conciliation’.
6. In the **Objective/Service** fields, select ‘Assessment’ and ‘CAP Conciliation’.
7. Enter the appropriate date into the **Start Date** field.
8. Click the 

button.

Immediate Engagement

Once a TA Applicant has completed an assessment and enrolled in CAP, FSD needs to be notified that the Recipient has complied with Immediate Engagement.

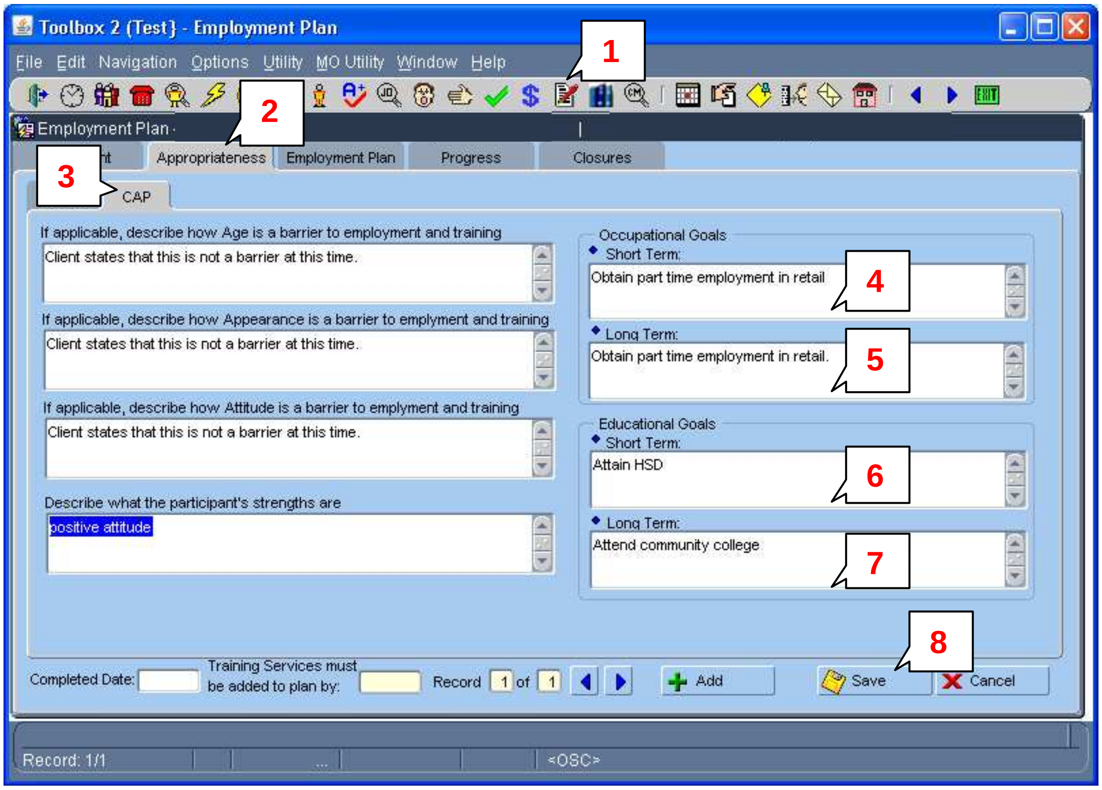


Figure 1: Employment Plan-Enrollment Module/Appropriateness Tab/CAP Sub-Tab

Step-by-Step:

1. Click on **Employment Plan/Enrollment** icon.
2. Click on the **Appropriateness** tab.
3. Click on the **CAP** sub-tab.
4. Complete the **Occupational Goals: Short Term**.
5. Complete the **Occupational Goals: Long Term**.
6. Complete **Educational Goals: Short Term**.
7. Complete **Educational Goals: Long Term**.
8. Click on the Save button. This will send a 'Complied With Immediate Engagement' alert to FSD. [Confirm the alert was sent by reviewing the **Seeker Service** tab found within the **Seeker History** module.]

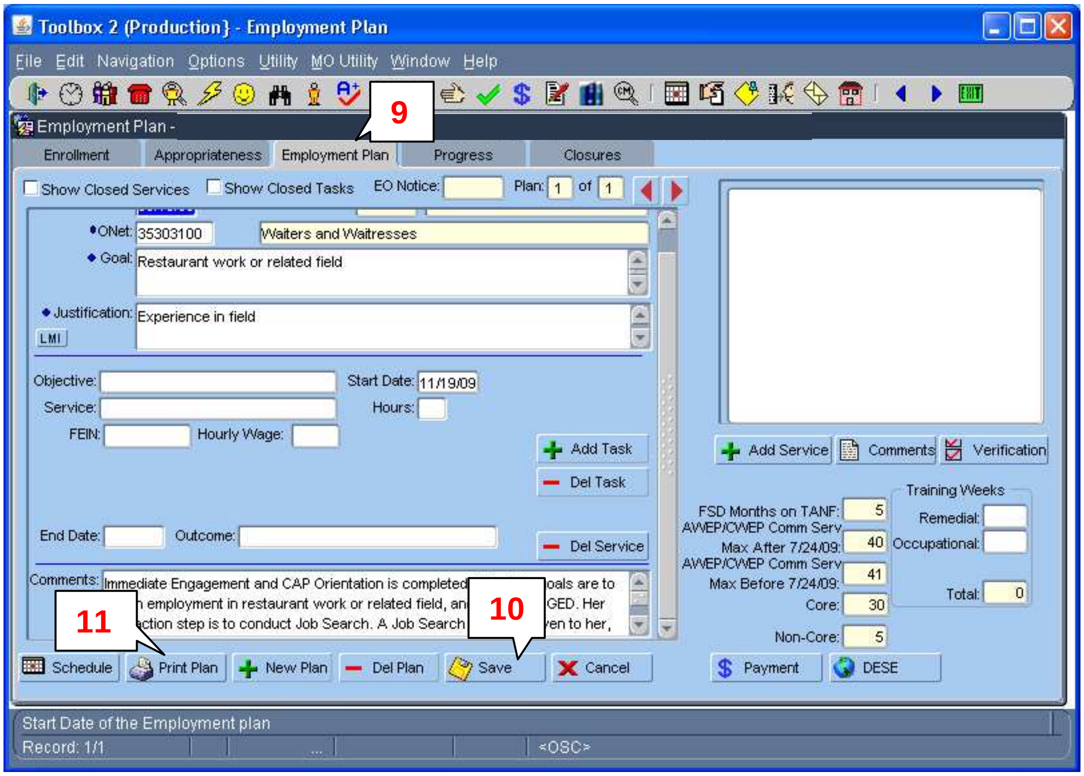
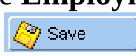


Figure 2: Employment Plan-Enrollment Module/Employment Plan Tab

9. Access the **Employment Plan** tab.
10. Click the 

button.
11. Click the 

button to print the Individual Employment Plan (IEP). The recipient is required to sign and date the IEP.

Letters

On 1/15/10, the revised “Letter” was effective. The following letters can be sent to TA recipients:

- CAP Call-In Letter #1
- Voluntary Callin Letter #1
- Voluntary Pre-Enrollment and Post-Enrollment Conciliation Free-Form Letter
- Mandatory Pre-Enrollment and Post-Enrollment Conciliation-Sanction Free-Form Letter
- Pre-Enrollment Reengagement
- Post-Enrollment Reengagement
- Free Form

Issuing Call-In Letters

To access a list of recipients pending for a specified call-in letter, and select letters to be mailed.

Call-In letters include:

- CAP Call-In Letter #1
- Pre Enrollment Reengagement Letter
- Voluntary Callin Letter #1

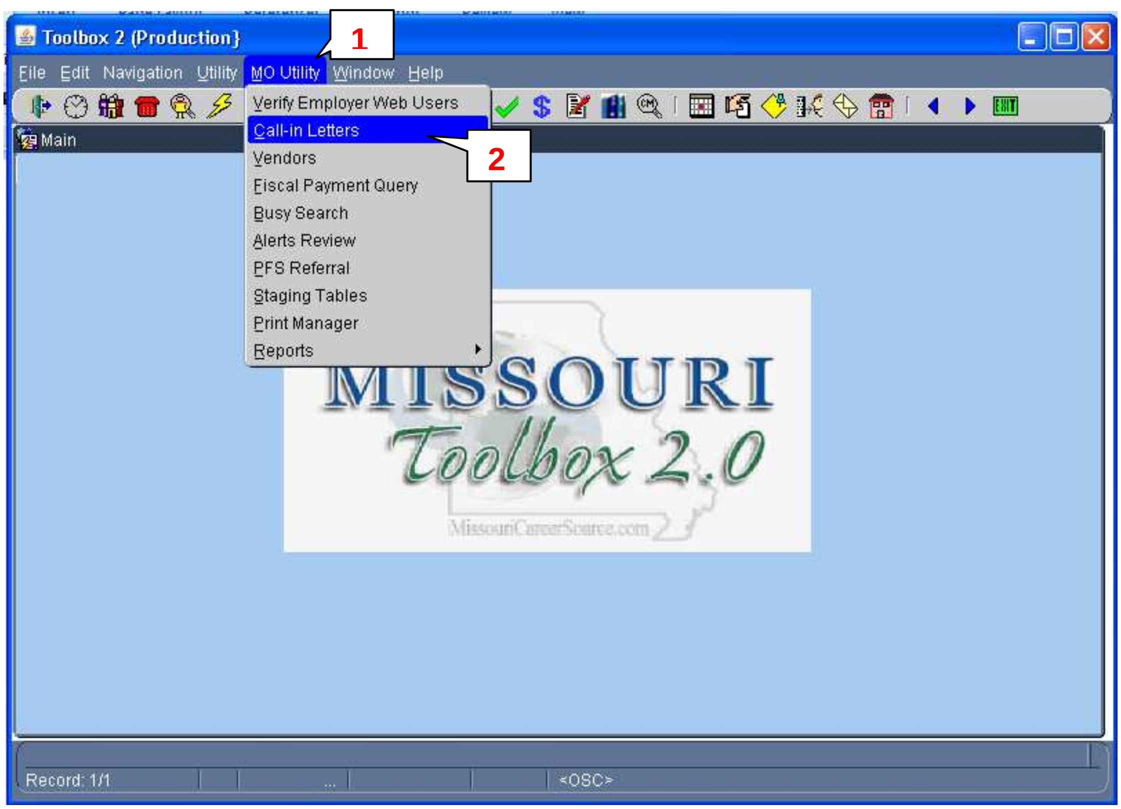


Figure 1: MO Utility Menu/Call-In Letters Option

Step-by-Step:

1. Click on the 

MO Utility menu
2. Select **Call-In Letters**.

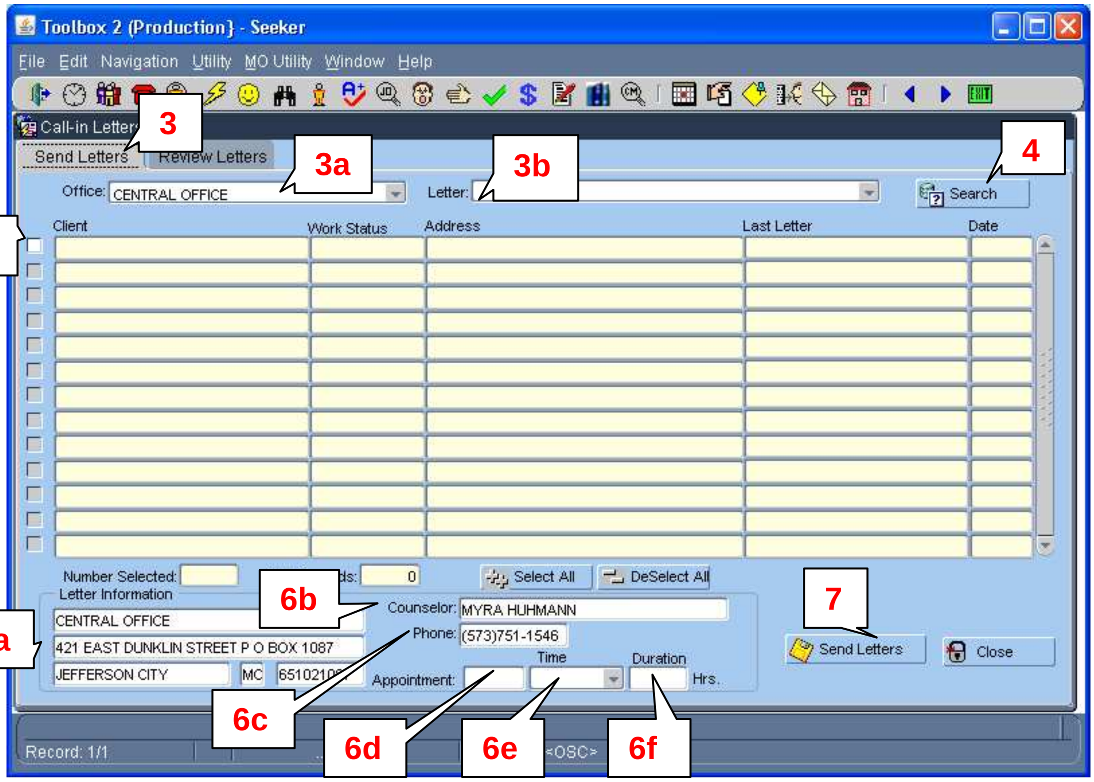


Figure 2: MO Utility Menu/Call-In Letters Option/Send Letters Tab

Step-by-Step:

3. On the **Send Letters** tab:
    a. Choose the **Office**.
    b. Choose the **Letter** which includes: CAP Call-In Letter #1, Pre Enroll Engagement, and Voluntary Callin Letter #1
4. Press the Search button to access a list of recipients pending for the office and letter type specified. (Example: a list of recipients from the Kennett Career Center who should next receive the CAP Call-In Letter #1.)
5. To send a letter, select the appropriate recipient's record(s) by checking the field to the left of the recipient's name.
6. With the recipient's record selected, if necessary, you can alter allowable fields including:
    a. **Letter Information** (includes name of CAP service provider, mailing address, city, state, and zip code),
    b. **Counselor**,
    c. **Phone** (counselor's phone number),
    d. **Appointment Date**,
    e. **Time** (appointment time), and
    f. **Duration**.
7. To finish, click on the Send Letters button to send letters. The letters will be mailed from DWD Central Office.

Reviewing Call-In Letters

Reviewing letters after they have been sent.

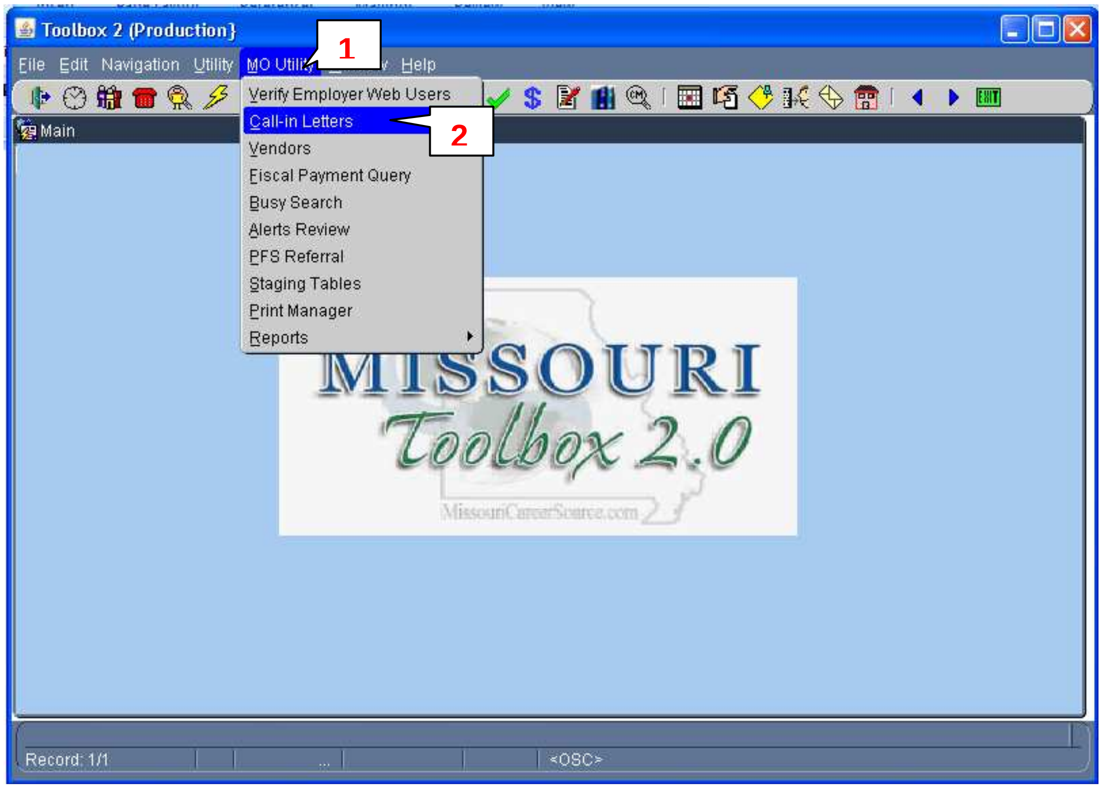


Figure 1: MO Utility Menu/Call-In Letters Option

Step-by-Step:

1. Click the MO Utility **MO Utility** menu
2. Select **Call-In Letters**.

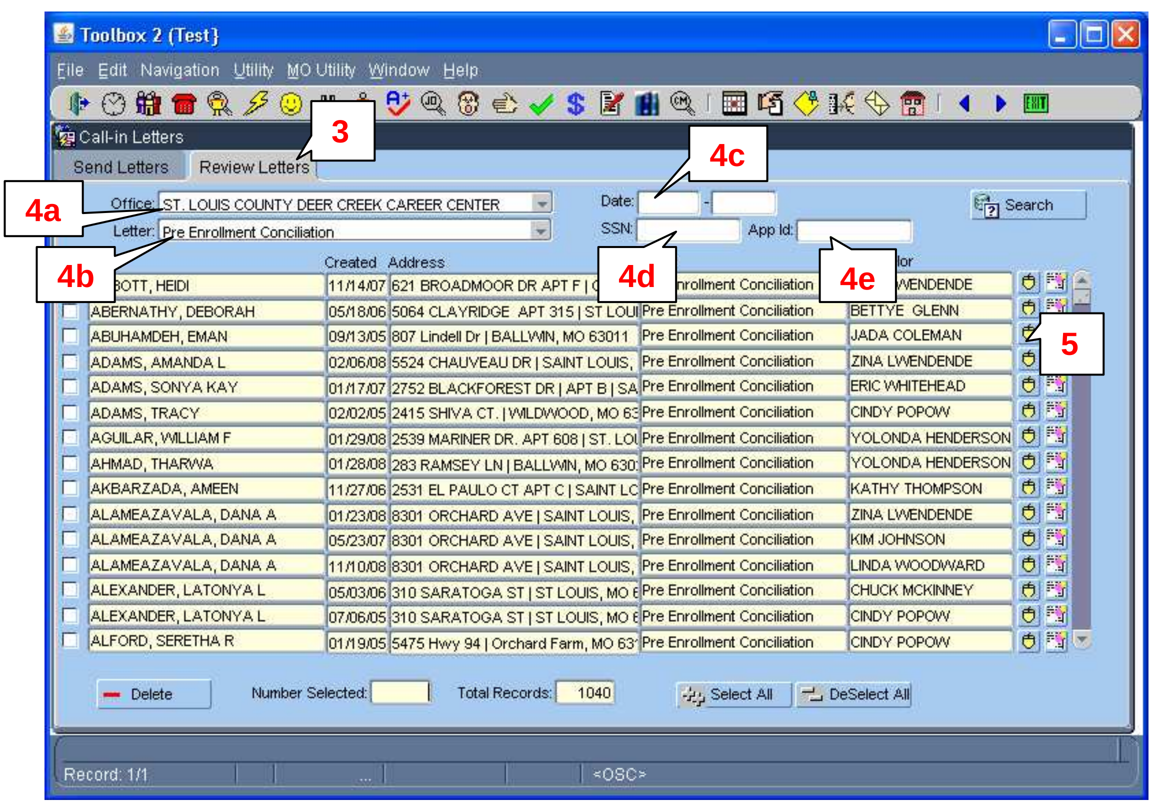


Figure 2: MO Utility Menu/Call-In Letters Option/Review Letters Tab

3. Click on the **Review Letters** tab.
4. To find a specific letter type or recipient, search by one or more of the following fields:
    a. **Office**,
    b. **Letter**,
    c. **Date**,
    d. **SSN**, and/or
    e. **App ID**.
5. To review a specific letter for a recipient, press the button associated on the recipient's line entry with the desired 'Letter' type.

Editing/Resending Call-In Letters

Letters can be edited to change the counselor name, phone number, appointment date, time, and duration. This can be done on the same day letters are issued, or when a letter needs to be resent because policy was not followed or a letter was returned with an updated address.

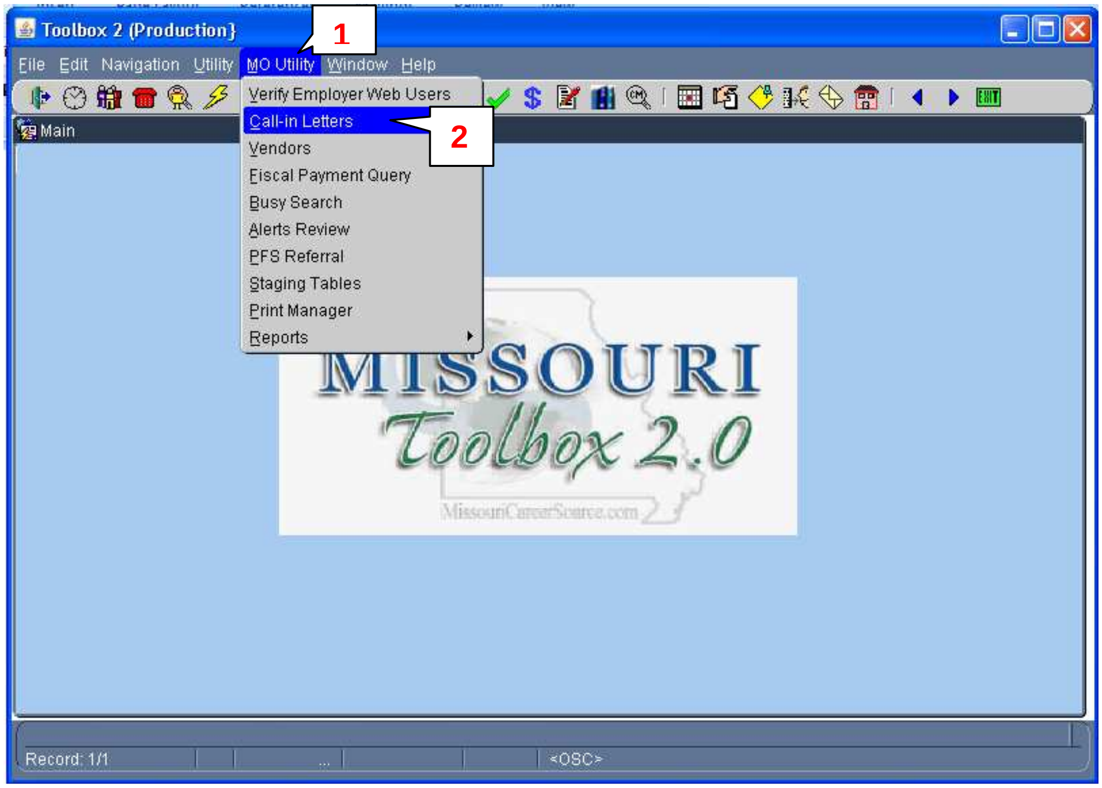


Figure 1: MO Utility Menu/Call-In Letters Option

Step-by-Step:

1. Click on 

MO Utility menu.
2. Select **Call-In Letters**.

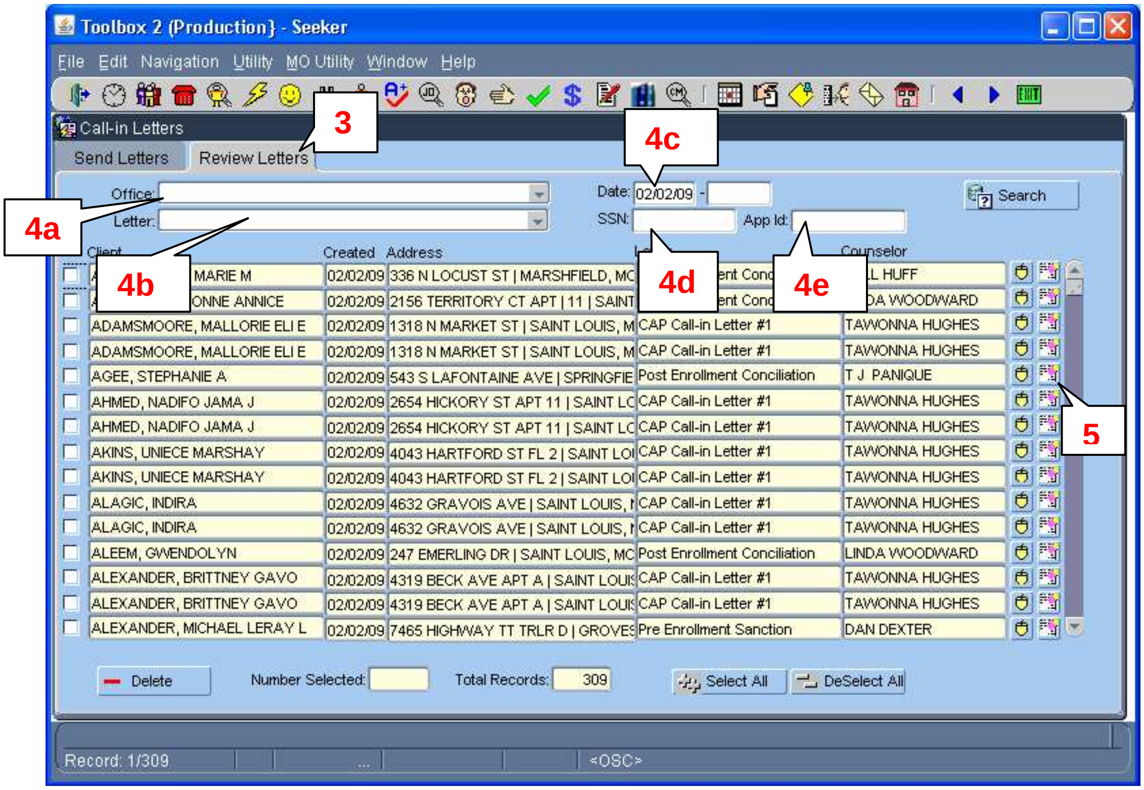


Figure 2: MO Utility Menu/Call-In Letters Option/Review Letters Tab

3. Click on the **Review Letters** tab.
4. Find the desired letter to edit by searching with the following fields:
   a. **Office**,
   b. **Letter**,
   c. **Date**,
   d. **SSN**, and/or
   e. **App Id**.
5. To review a specific letter for a recipient, press the  button associated on the recipient's line entry with the desired 'Letter' type.

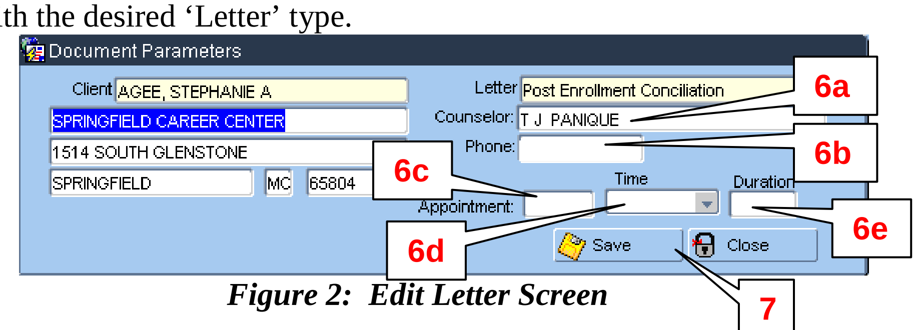
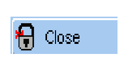


Figure 2: Edit Letter Screen

6. An **Edit Letter** screen will pop up. This screen will allow you to edit the:
   a. Counselor,
   b. Phone,
   c. Appointment Date,
   d. Time, and/or
   e. Duration fields.

   [The conciliation letters will also require you to input an appointment date/time/duration even though it is not displayed in the actual letter.]
7. Once you are finished editing fields, press the  and  buttons.

NOTE: Letters may be edited until 4:00pm the same day they were issued.

Deleting Call-In Letters

Deleting letters after they have been issued.

There are two way to delete Call-In Letters.

These instructions cover Option #1.

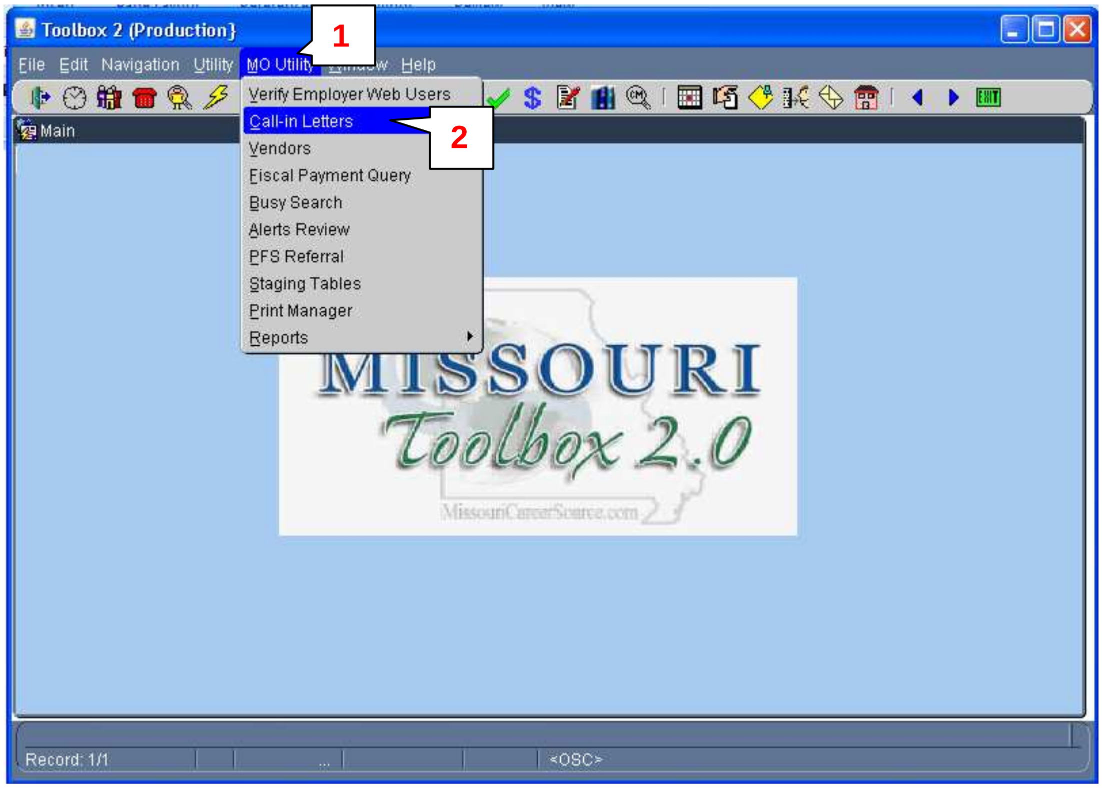


Figure 1: MO Utility Menu/Call-In Letters Option

Step-by-Step:

1. Click on the  **MO Utility** menu.
2. Select **Call-In Letters**.

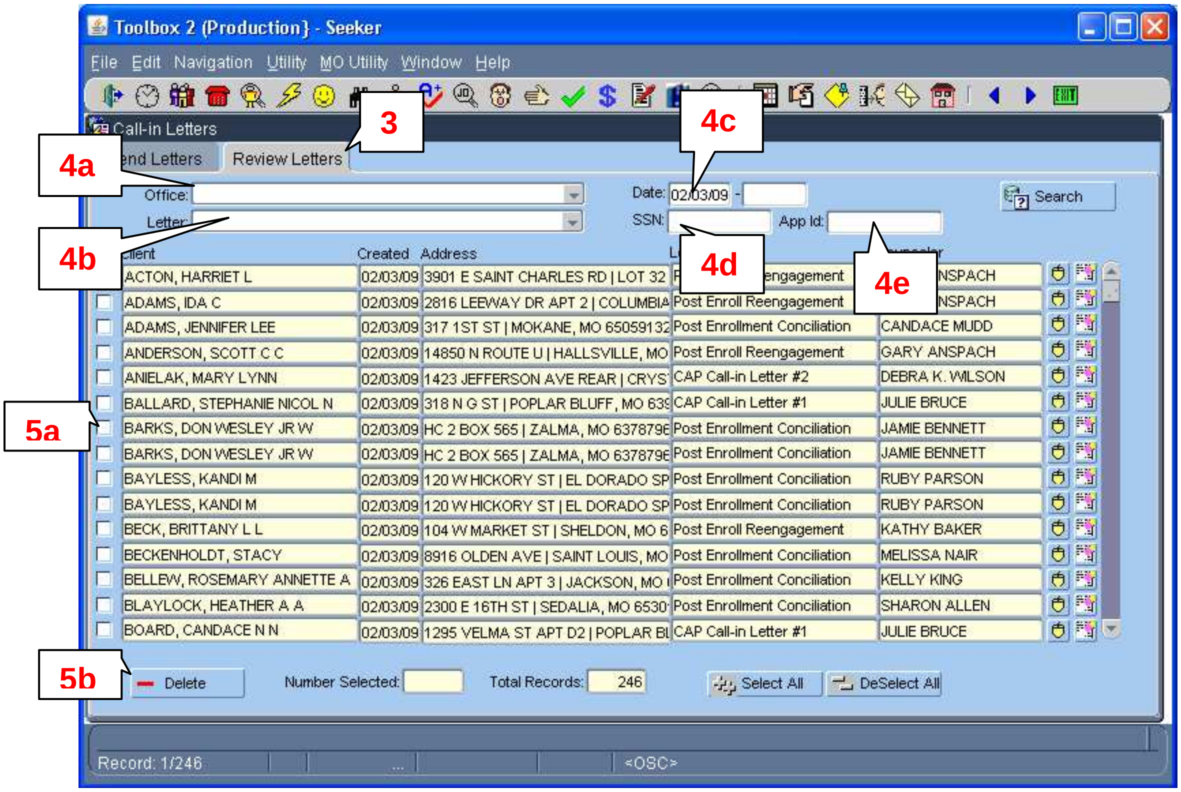


Figure 2: MO Utility Menu/Call-In Letters Option/Review Letters Tab

3. Click on the **Review Letters** tab.
4. Find the desired letter to delete by using the fields of:
    a. **Office**,
    b. **Letter**,
    c. **Date**,
    d. **SSN**, and/or
    e. **App Id**.
5. To delete a specific letter for a recipient:
    a. Check the field to the left of the recipient's name that is associated on the recipient's line entry with the desired 'Letter' type.
    b. Press the Delete button. If you have multiple letters to delete, check all entries that apply and press the Delete button.

NOTE: Letters may be deleted until 4:00pm the same day they were issued.

These instructions cover Option #2.

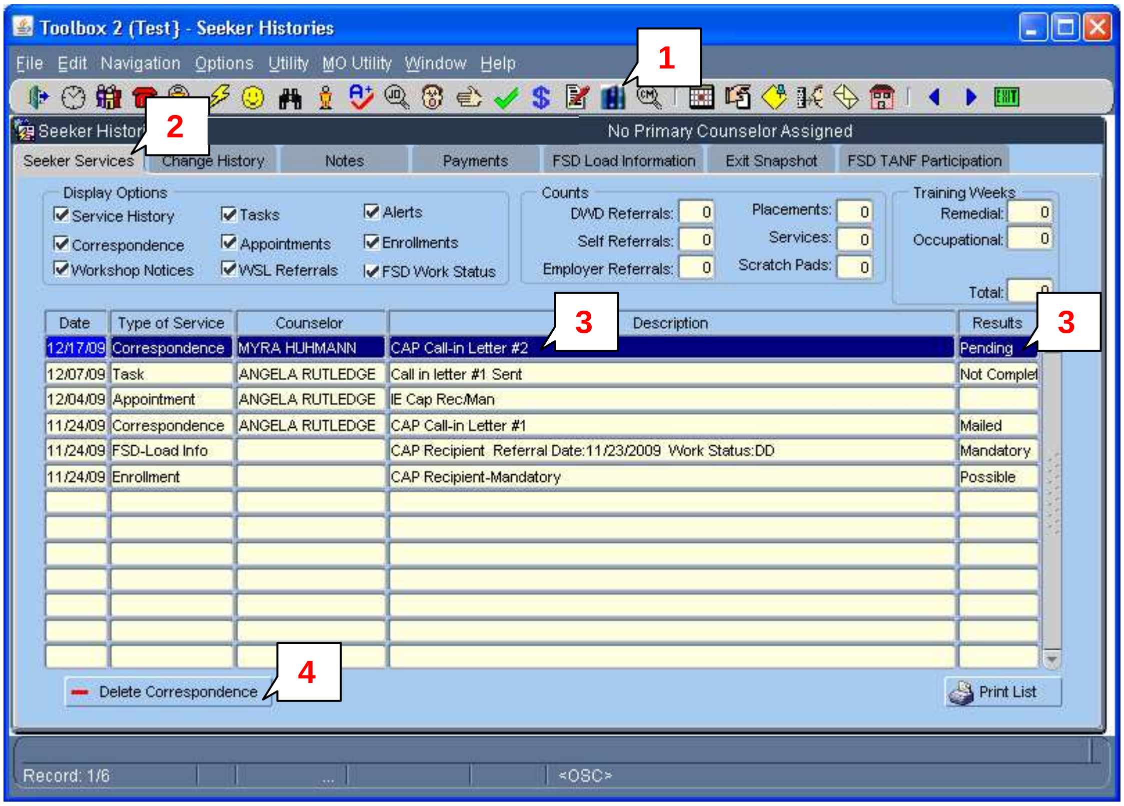
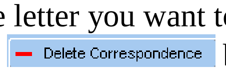


Figure 1: Seeker History Module/Seeker Services Tab

Step-by-Step:

1. Click on the  **Seeker History** icon.
2. Select the **Seeker Services** tab.
3. Select the letter you want to delete. [The letter must display **Pending** in the Results field.]
4. Press the 

button.

NOTE: Letters may be deleted until 4:00pm the same day they were issued.

Free Form Letters
The following letters are sent to TA recipients by free-form letter:

- Voluntary Pre-Enrollment and Post-Enrollment Conciliation Free-Form Letter
- Mandatory Pre-Enrollment and Post-Enrollment Conciliation-Sanction Free-Form Letter
- Free-Form Letter for recipients who need additional contact

The 'free-form' letter language can be found within the "Letter" policy.

Accessing free form letters.

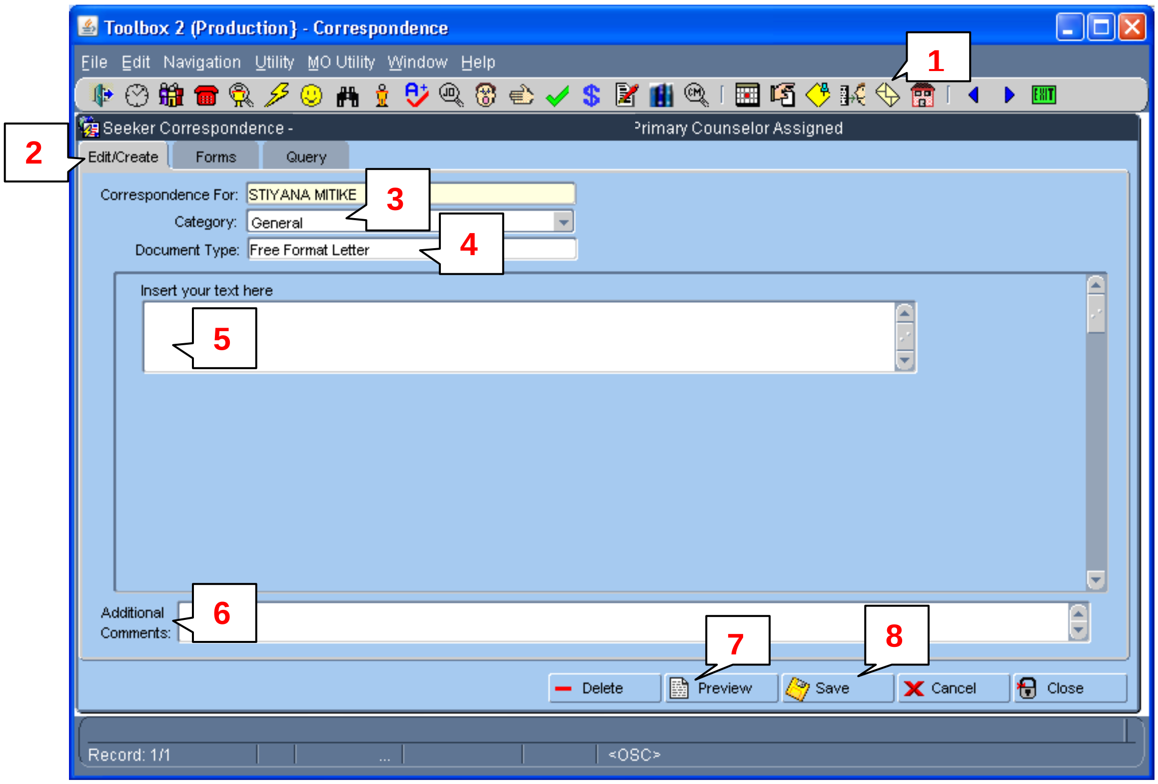


Figure 1: Correspondence Module/Edit-Create Tab

Step-by-Step:
1. Click on the **Seeker Correspondence** icon (or press Alt + C).
2. The **Edit/Create** tab will display.
3. From the **Category:** field, select 'General' from the drop down menu.
4. Double click in the **Document Type:** field and select 'Free Format Letter'.
5. An **Insert Your Text Here** field will appear. Type the necessary information into this field.
6. Use the **Additional Comments:** field to record additional comments, if applicable.
7. Click on the Preview button to preview and print the letter.
8. Click on the Save button to save the letter.

NOTE: DWD Central Office does not mail Free Format Letters; this is the responsibility of each office.

<u>**Issuing Post-Enrollment Letters**</u>

The following letters are sent to TA recipients using the post-enrollment letter function:

- Post Enrollment Reengagement

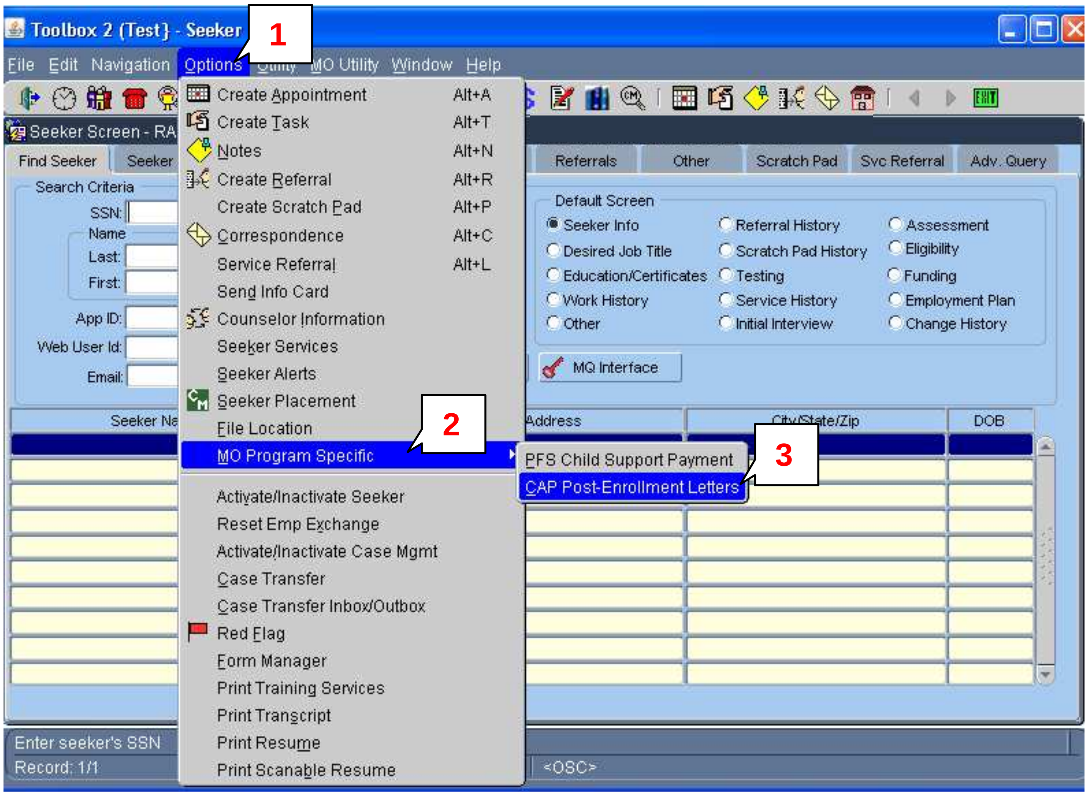


Figure 1: Options Menu/MO Program Specific Option/CAP Post-Enrollment Letters Option

Step-by-Step:

1. With a recipient's record open, click on the Options **Options** menu.
2. Select **MO Program Specific** option.
3. Select **CAP Post-Enrollment Letters**.

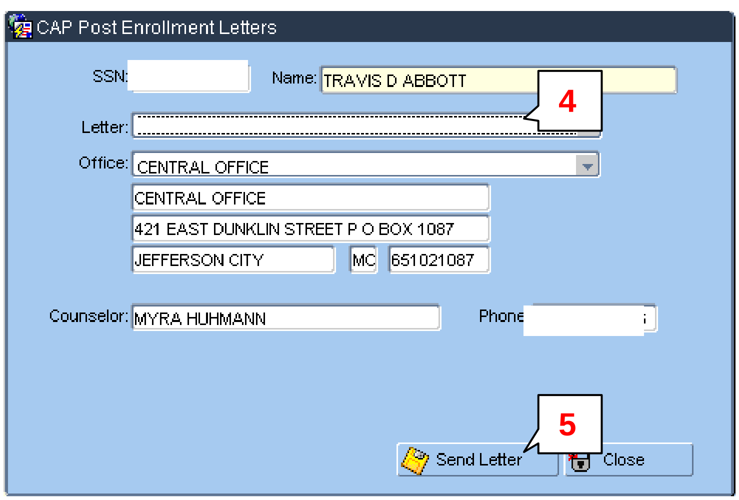


Figure 2: CAP Post Enrollment Letter

4. From the **CAP Post Enrollment Letters** pop-up screen, select the appropriate **Letter** from the drop down menu, and make any other necessary changes to the information displayed.
5. Click the Send Letter button to issue the letter.

Reviewing Post-Enrollment Letters

Post-Enrollment letters can be reviewed two different ways.

Instructions for Option #1.

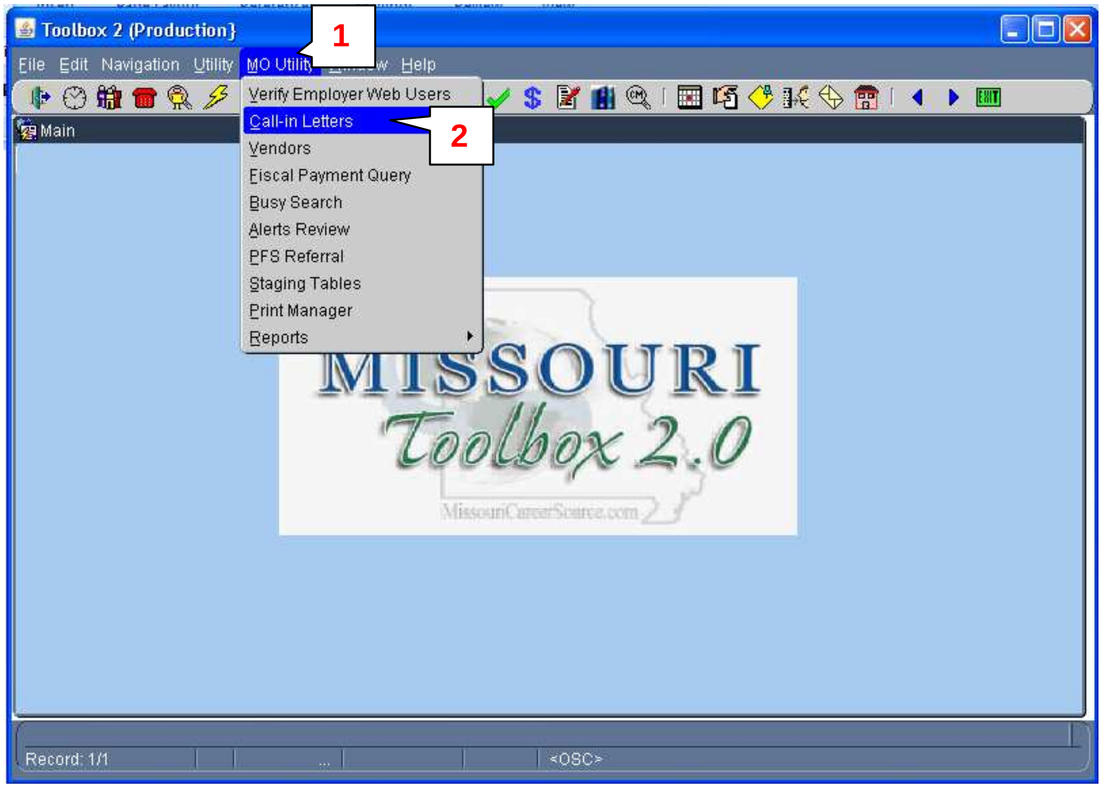


Figure 1: MO Utility Menu/Call-In Letters Option

Step-by-Step:

1. Click on the MO Utility **MO Utility** menu.
2. Select **Call-In Letters**.

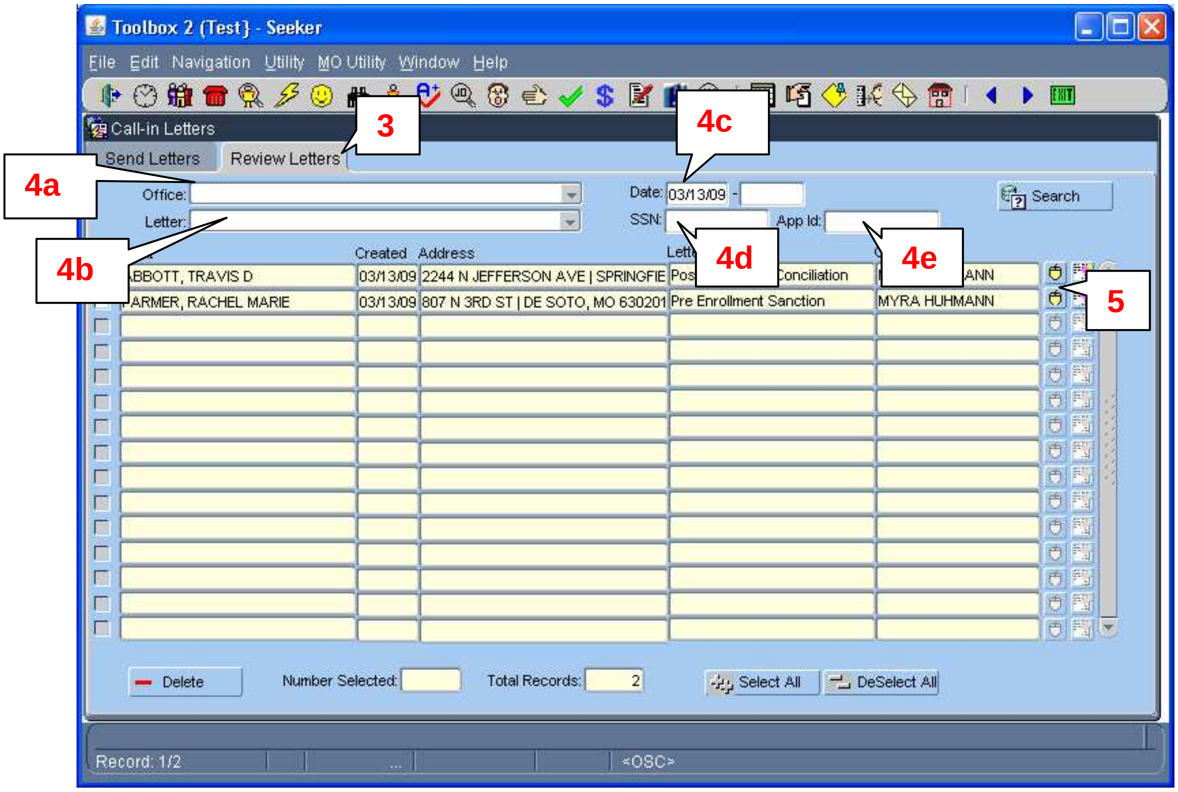


Figure 2: MO Utility Menu/Call-In Letters/Review Letters Tab

3. Click on the **Review Letters** tab.
4. To find a specific letter type or recipient, complete the appropriate field(s) including:
    a. **Office**,
    b. **Letter**,
    c. **Date**,
    d. **SSN**, and/or
    e. **App Id**.
5. To review a specific letter for a recipient, press the button associated on the recipient's line entry with the desired 'Letter' type.

Instructions for Option #2.

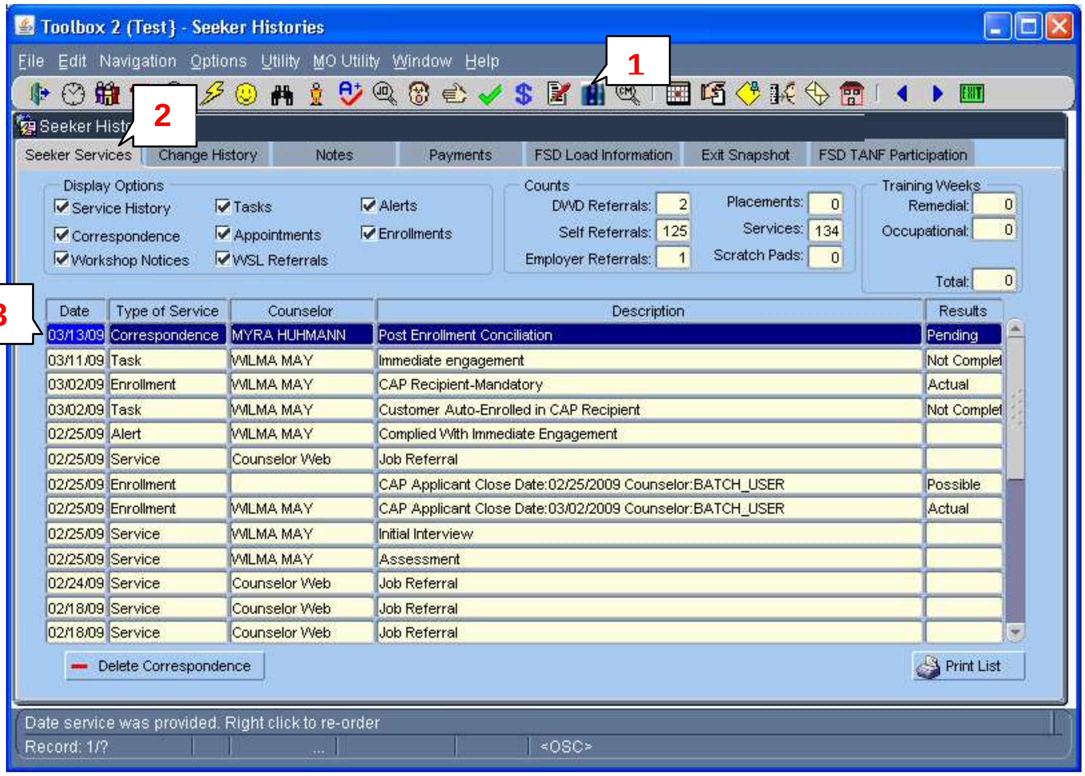


Figure 4: Seeker History/Seeker Services Tab

Step-by-Step:

1. Click on the  **Seeker History** icon.
2. The **Seeker Services** tab will display.
3. Double-click on the letter you want to review.

Deleting Post-Enrollment Letters

Post-Enrollment letters can be deleted twp different ways.

Instructions for Option #1.

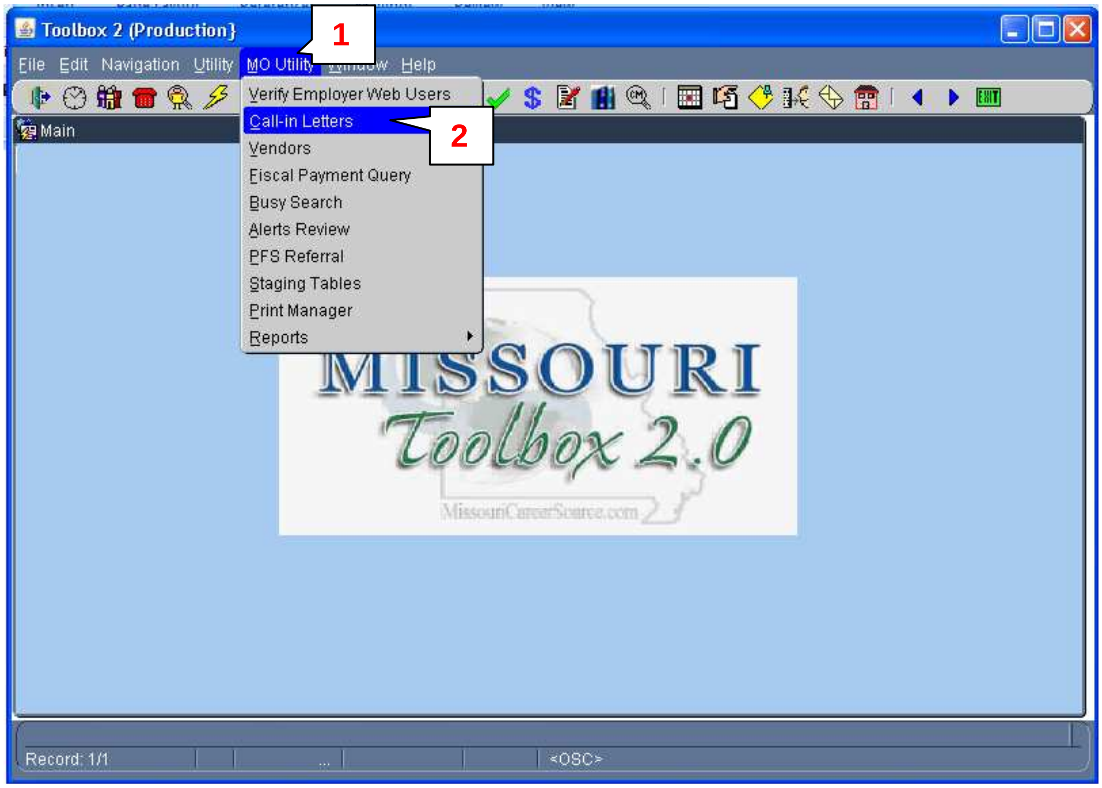


Figure 1: MO Utility Menu/Call-In Letters Option

Step-by-Step:

1. Click on the 

 MO Utility menu
2. Select **<u>Call-In Letters</u>**.

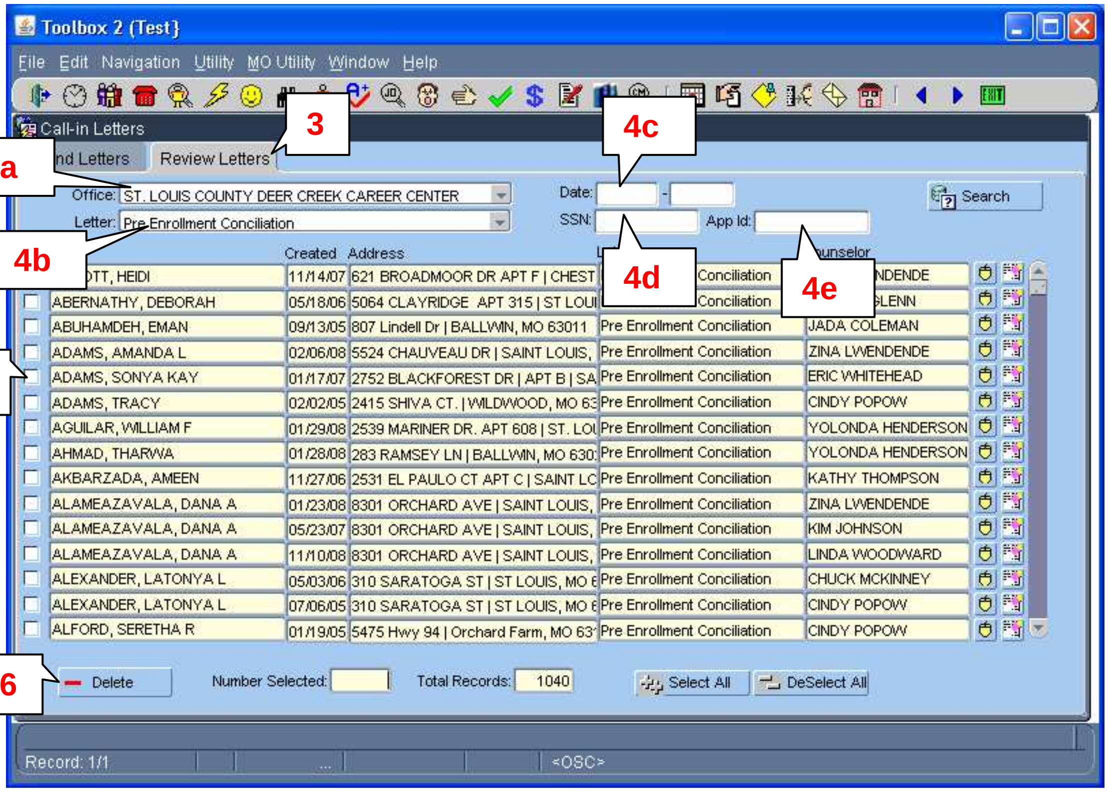


Figure 2: MO Utility Menu/Call-In Letters/Review Letters Tab

3. Access the **Review Letters** tab.
4. To find a specific letter type or recipient, complete the appropriate field(s) including:
    a. **Office**,
    b. **Letter**,
    c. **Date**,
    d. **SSN**, and/or
    e. **App Id**.
5. To delete a specific letter for a recipient, check/click the field to the left of the recipient's name associated on the recipient's line entry with the desired 'Letter' type.
6. Click on the 

button.

Instructions for Option #2.

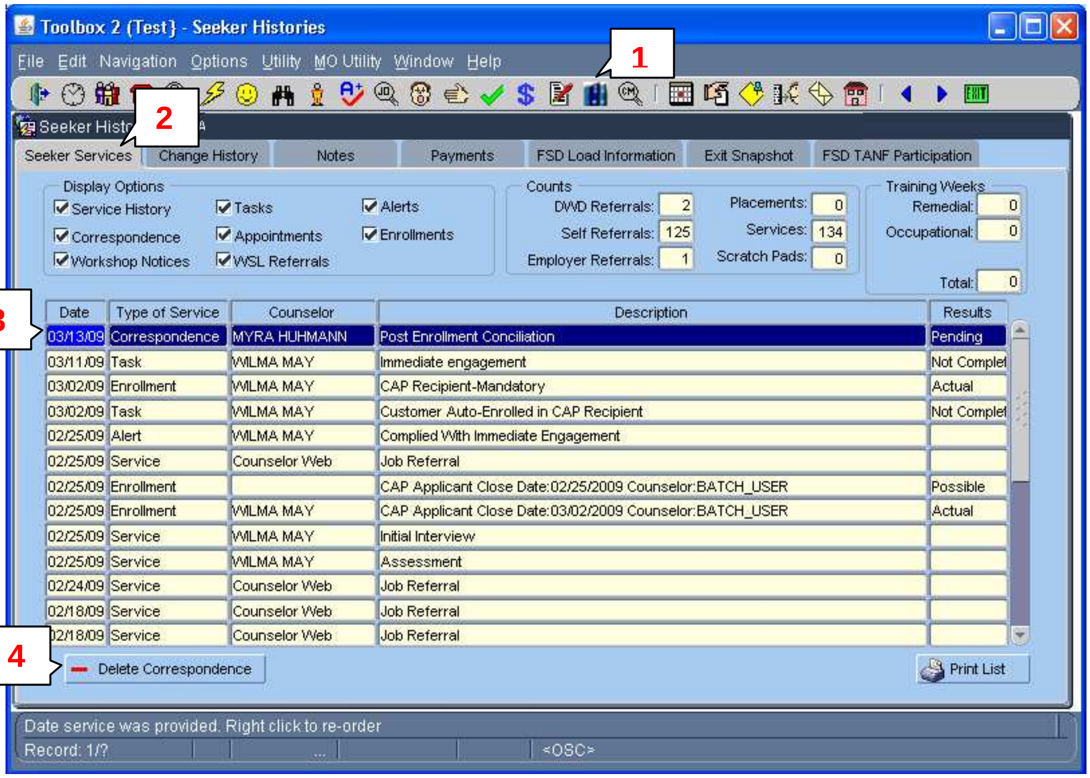


Figure 4: Seeker History/Seeker Services Tab

Step-by-Step:

1. Click on the **Seeker History** icon.
2. The **Seeker Services** tab will display.
3. Highlight the letter you want to delete.
4. Click on the Delete Correspondence button.

MQ Search

The MQ Search allows you to pull a referral from FAMIS the day the individual applied for Temporary Assistance (TA) benefits at FSD before it is sent to Toolbox 2.0 in the nightly files.

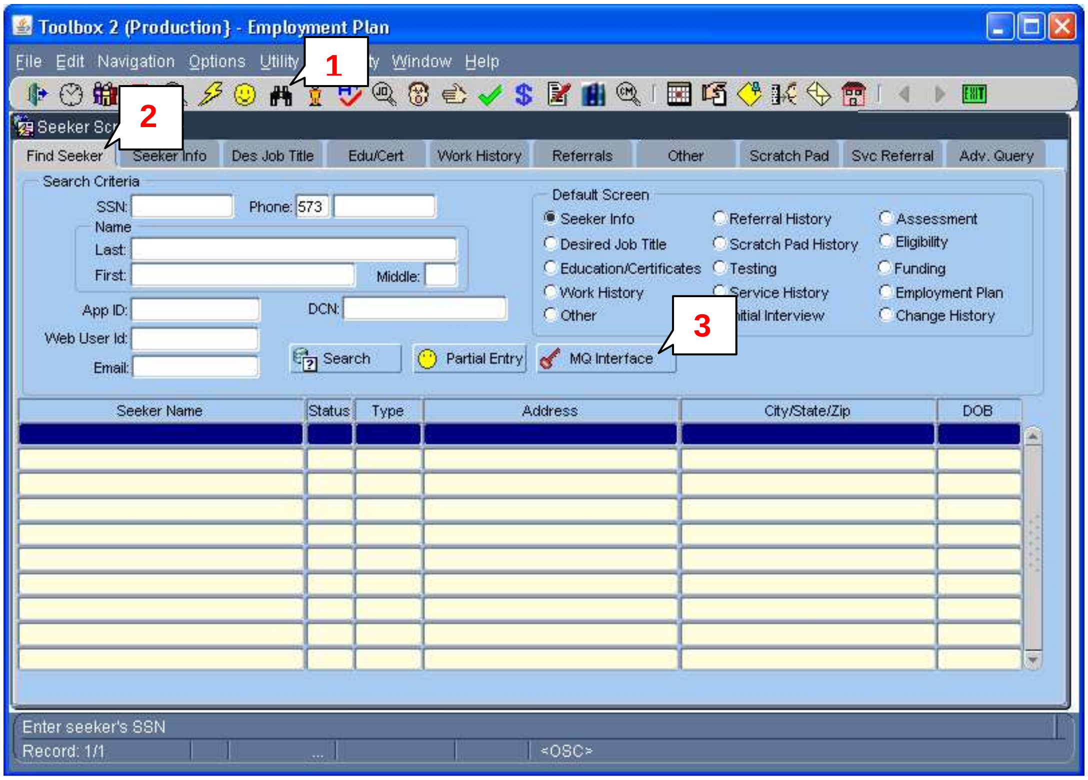


Figure 1: Seeker Correspondence/Forms Tab

Step-by-Step:

1. Click on the **Find Seeker** icon.
2. The **Find Seeker** tab will display.
3. Click on the MQ Interface button to access the MQ pop-up screen.

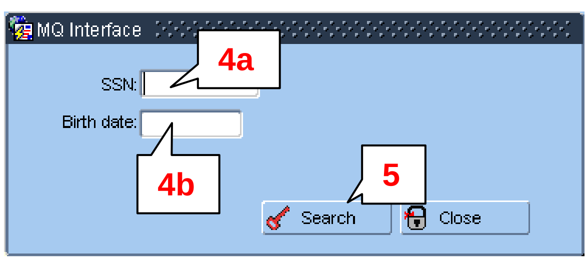


Figure 2: MQ Interface Pop-Up Screen

4. On the screen, enter the client's:
    a. Social Security Number and
    b. Date of Birth.
5. Click on the Search button to perform the MQ search.

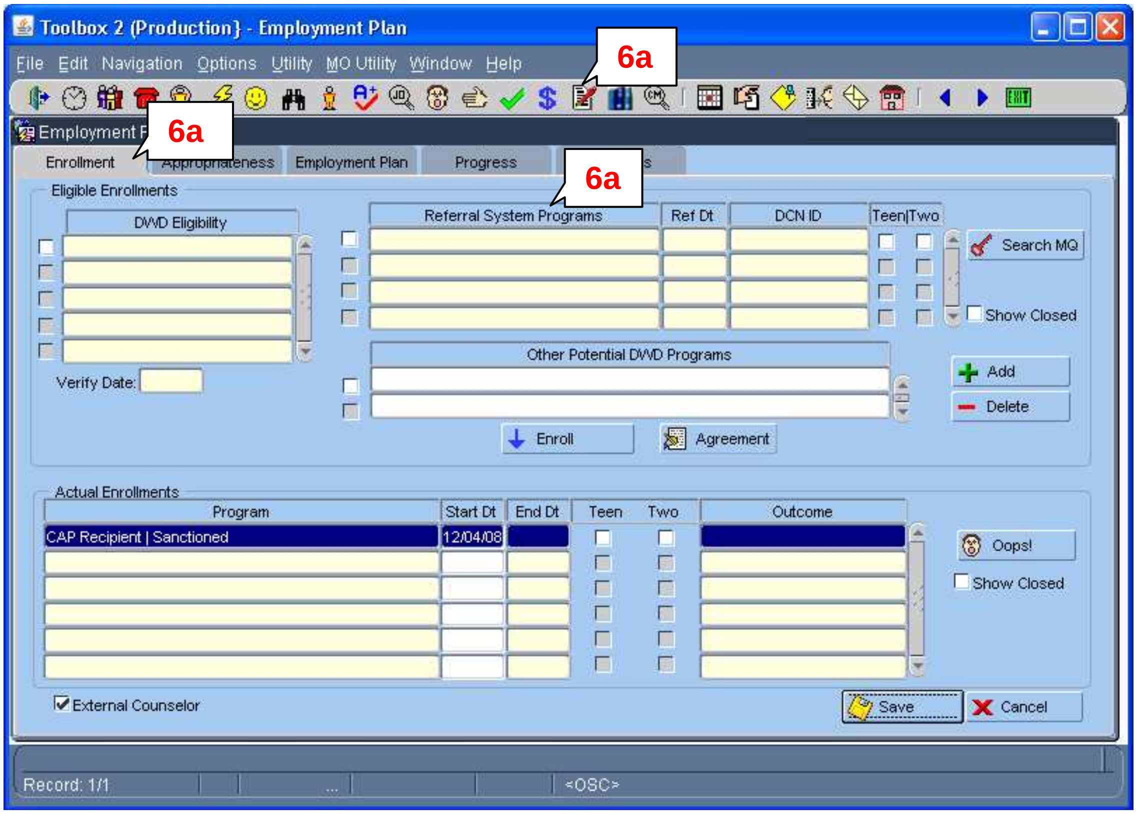


Figure 3: Employment Plan-Enrollment Module/Enrollment Tab

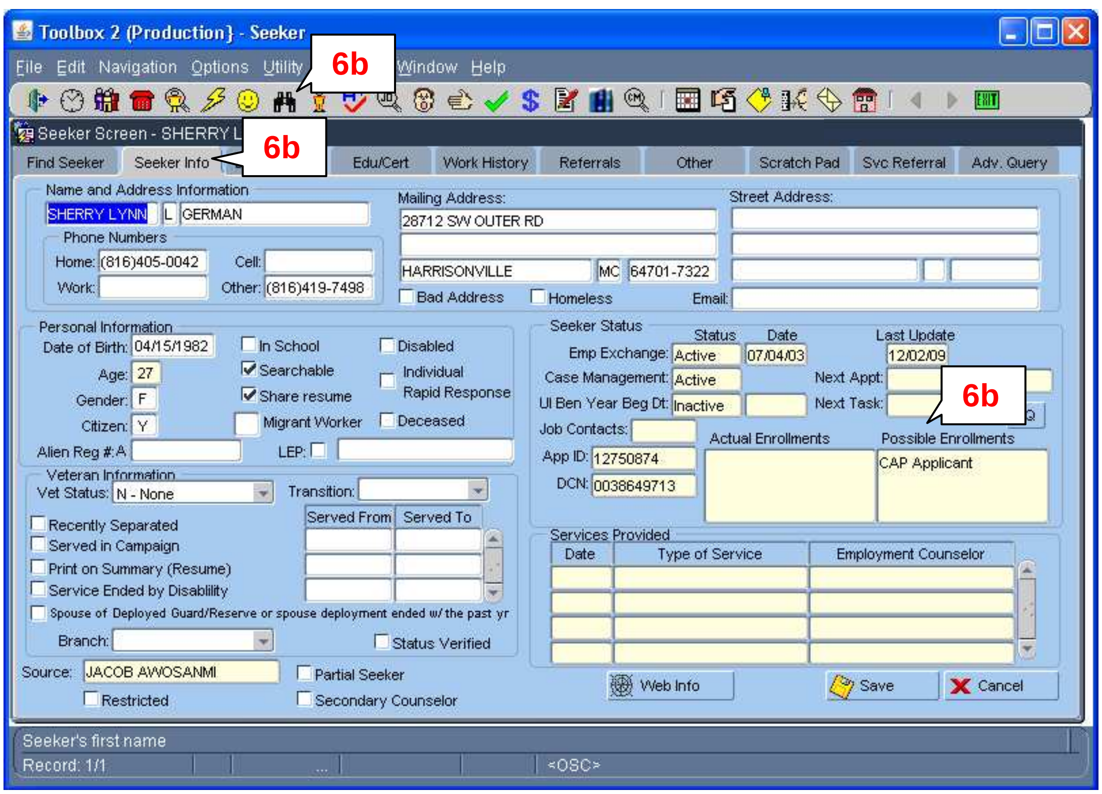


Figure 4: Find Seeker Module/Seeker Info Tab

6. If a referral is available, it will appear on the:
    a. **Enrollment** tab within the **Employment Plan/Enrollment** module, and
    b. Under the **Possible Enrollments** field on the **Seeker Info** tab within the **Find Seeker** module.

If a referral is not available, you will receive a message indicating no information found.

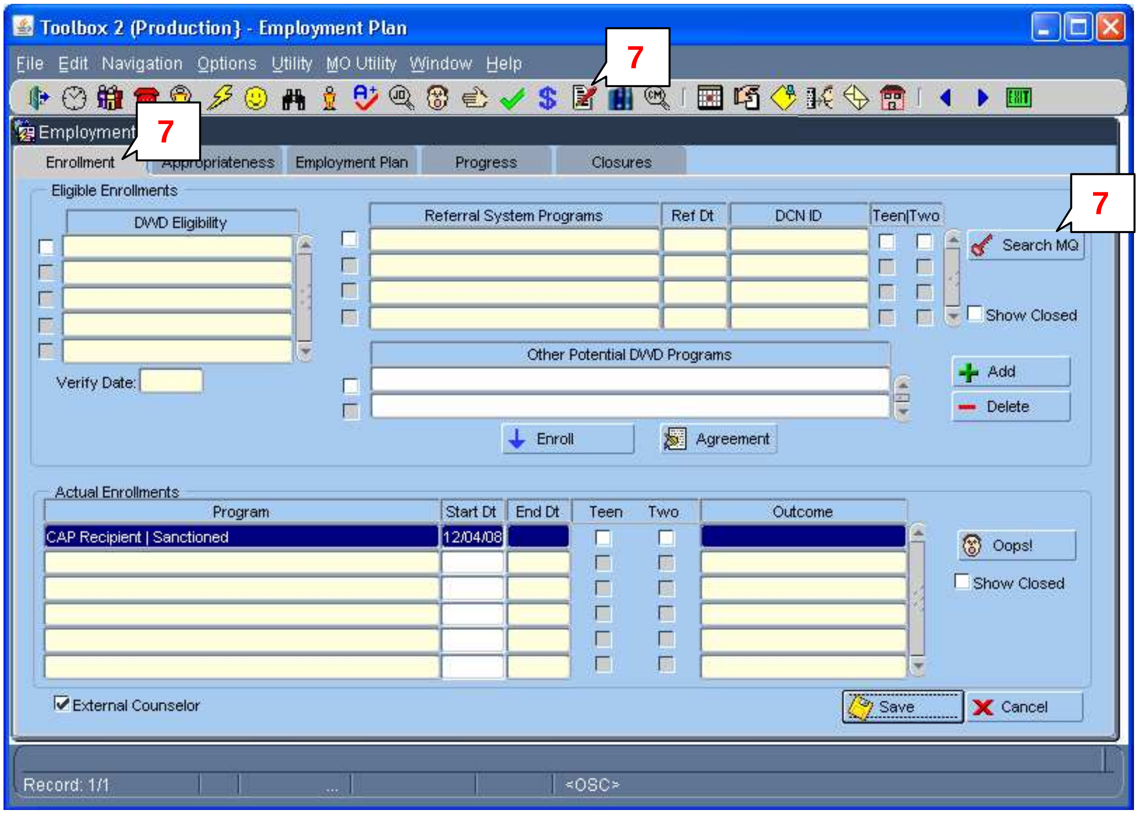


Figure 5: Employment Plan-Enrollment Module/Enrollment Tab

7. Another method for accessing MQ is through the 

button on the **Enrollment** tab within the **Employment Plan/Enrollment** module.

Office Locations

Changing the office location you are logged into.

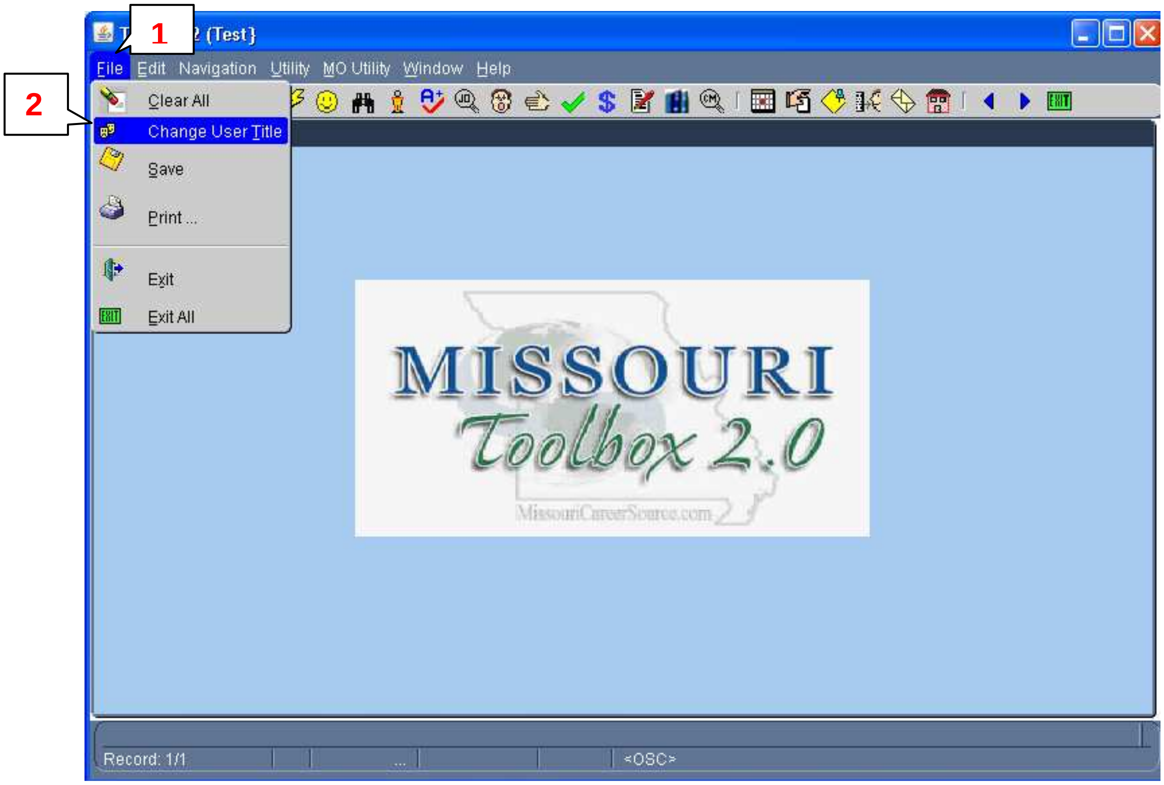


Figure 1: Splash Screen/File Menu/Change User Title Option

Step-by-Step:

1. While on the **Splash** screen, click on the File **File** menu.
2. Select the **Change User Title** option. The **Change Agent Hat** screen will appear.

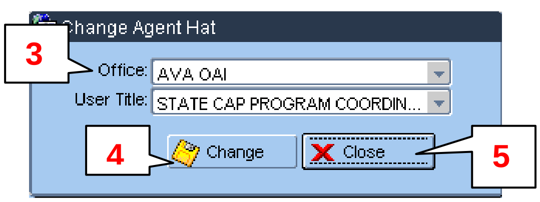


Figure 2: Change Agent Hat Screen

3. Select the appropriate **Office** from the drop-down menu.
4. Click on the Change button to make the change
5. Click on **Close**.

Seeker: Searching for a record

Searching for TA applicants or recipients in Toolbox 2.0.

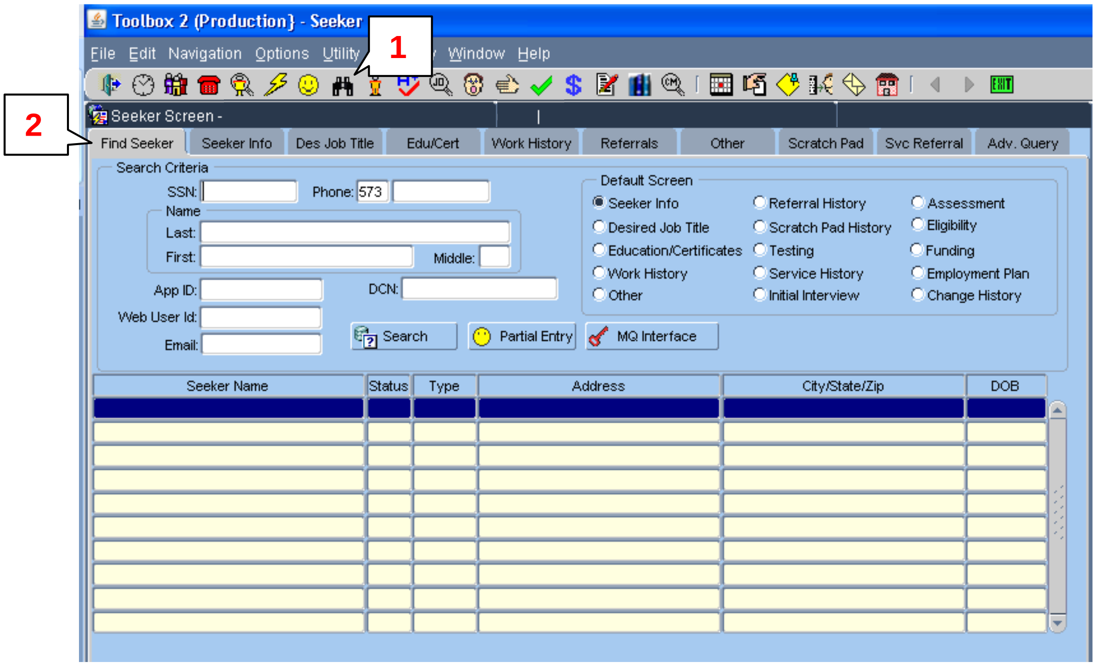


Figure 1: Find Seeker Module/Find Seeker Tab

Step-by-Step:

1. Click on **Find Seeker** icon (or press Ctrl + N).
2. On the **Find Seeker** tab, enter the appropriate search criteria for the recipient.

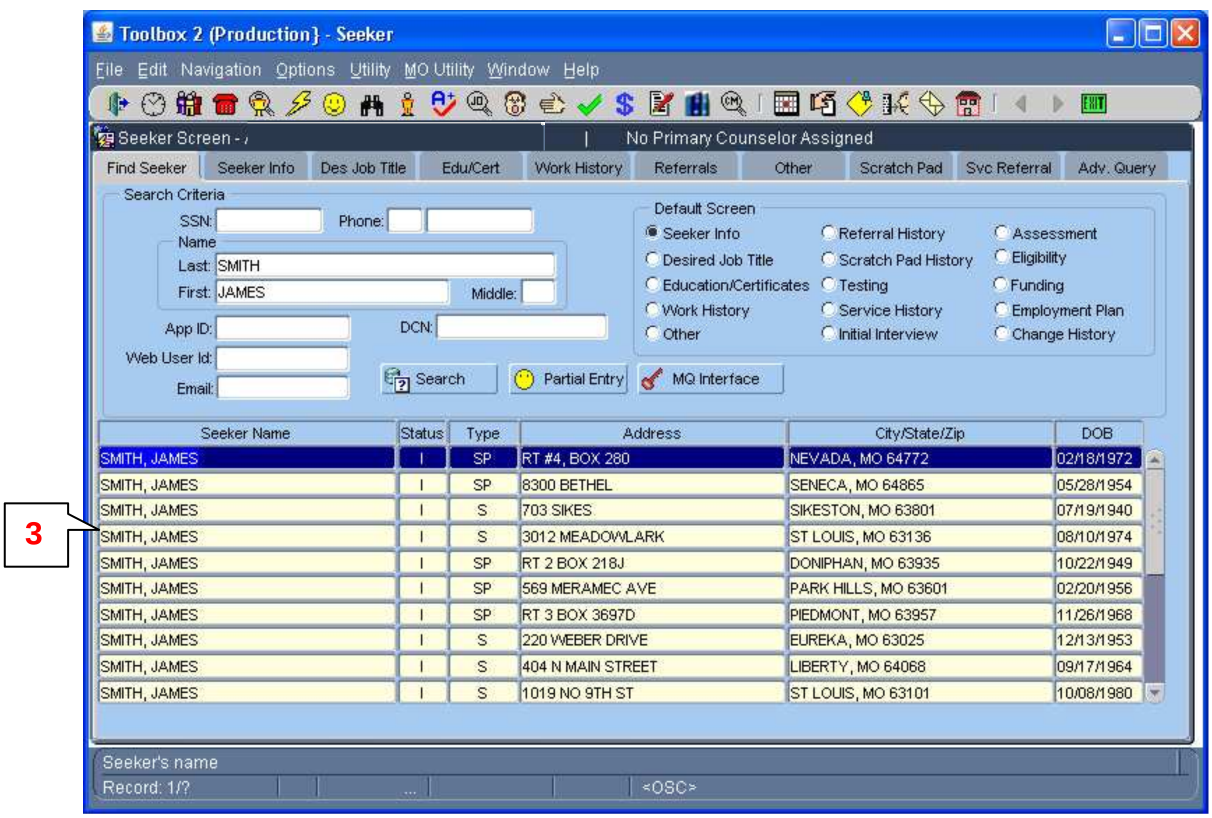


Figure 3: Find Seeker Module/Find Seeker Tab

3. If the applicant's or recipient's name is used as the search criteria and there are multiple records that match the name, a list of names will be produced in the lower portion of the **Find Seeker** tab. Double click on the applicable name to access the correct record.

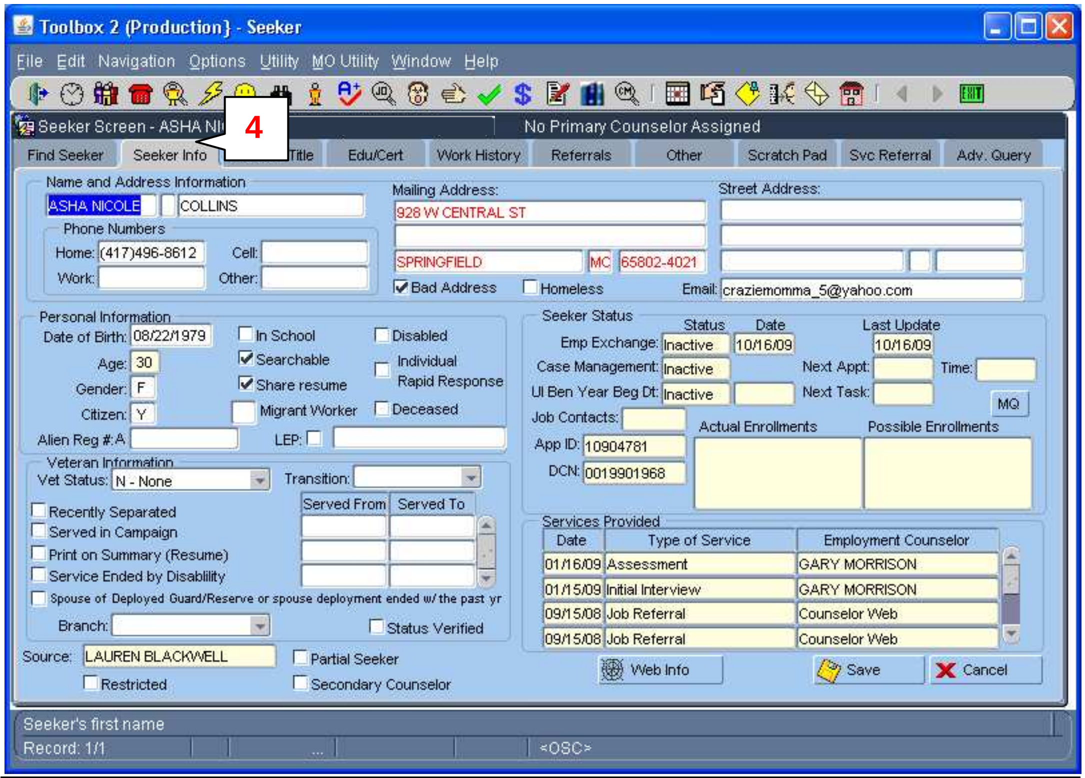


Figure 2: Find Seeker Module/Seeker Info Tab

4. The **Seeker Info** tab displays the applicant's or recipient's basic information.

Seeker: Entering Seeker Information

If an applicant or recipient search did not produce a record(s), you must enter the seeker information. [Staff should search for records by the DCN as this is the only way to determine if there are duplicate records.]

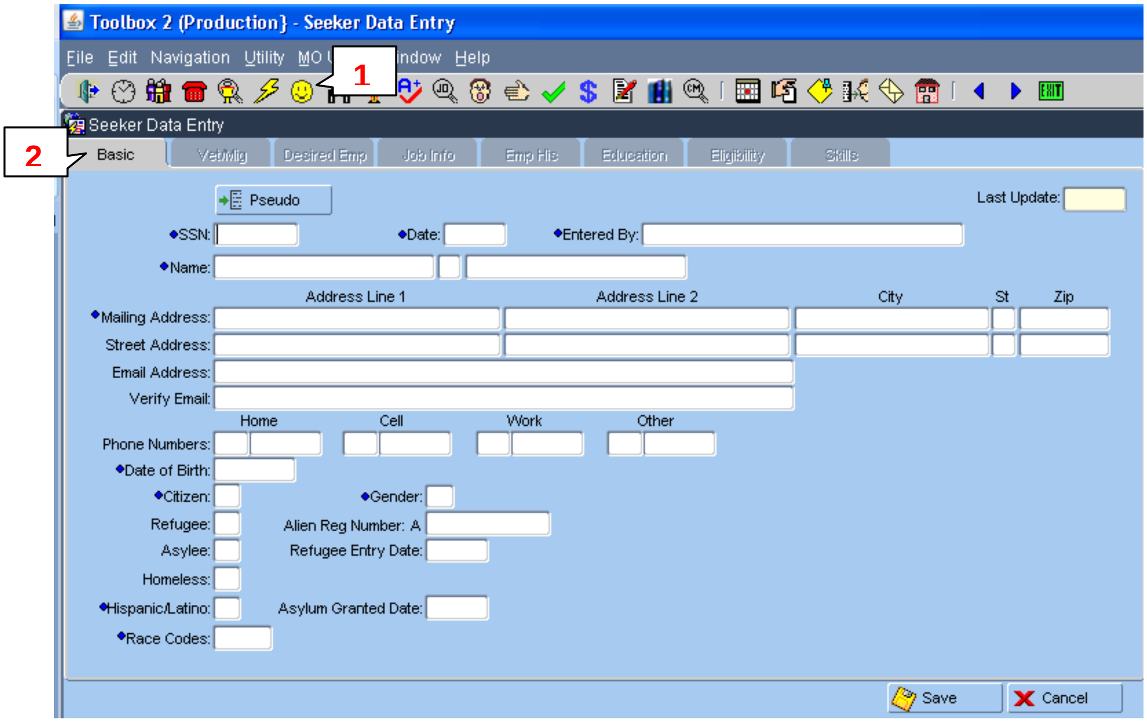


Figure 1: Seeker Entry Module/Basic Tab

Step-by-Step:

1. Click on **Seeker Entry** icon (or press Ctrl + K).
2. On the **Basic** tab, all fields with a blue diamond ( ) must be completed in order to create a record in Toolbox 2.0.

Seeker Services Tab

The 'Seeker Services' tab contains information such as enrollments, appointments, alerts issued, call-in letters mailed or pending, notification of new case notes added for the Applicant/Recipient, tasks, etc.

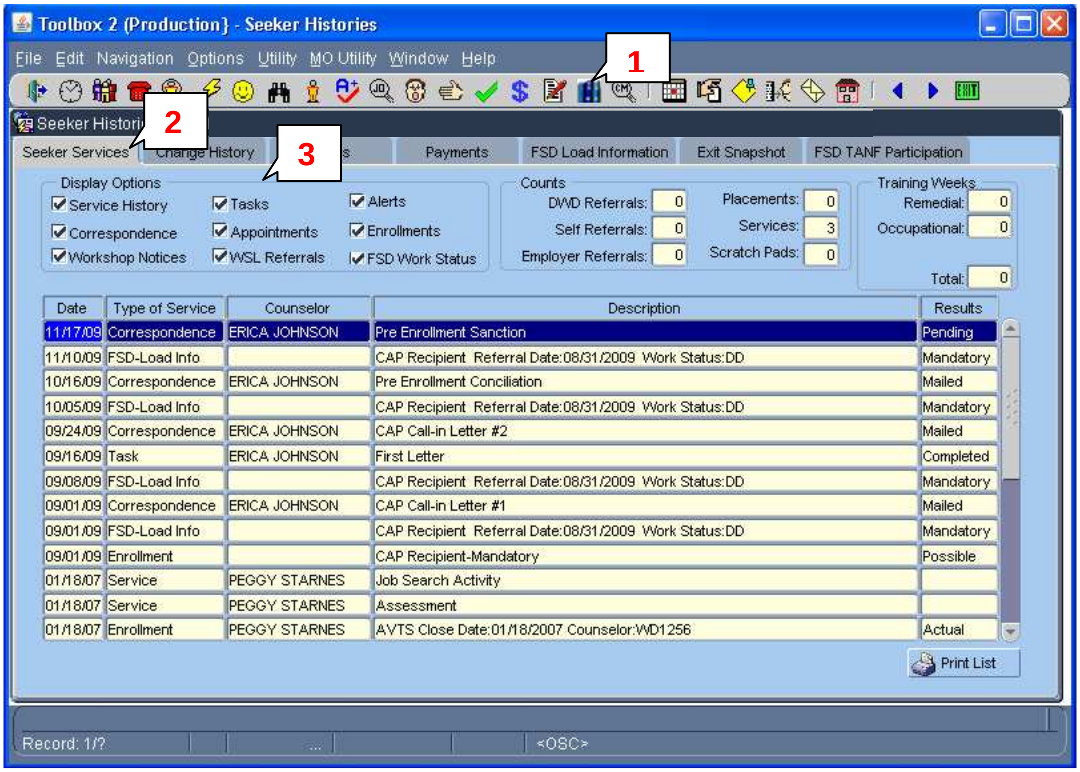


Figure 1: Seeker History Module/Seeker Services Tab

Step-by-Step:

1. Click on the  **Seeker History** icon.
2. Access the **Seeker Services** tab.
3. If you would only like to see certain items, you can "uncheck" any of the **Display Options**.

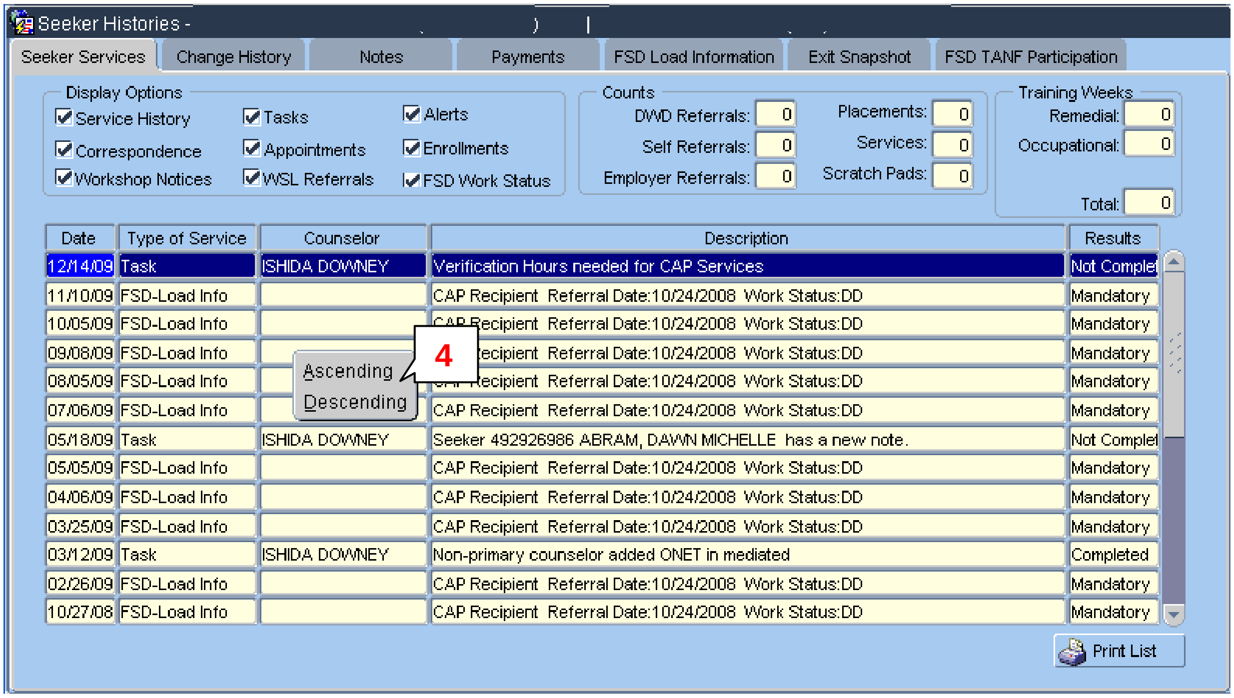


Figure 2: Seeker History Module/Seeker Services Tab/Ascending-Descending Option

4. You can right click in the **Date** field for an option to sort the information in 'ascending' or 'descending' order.

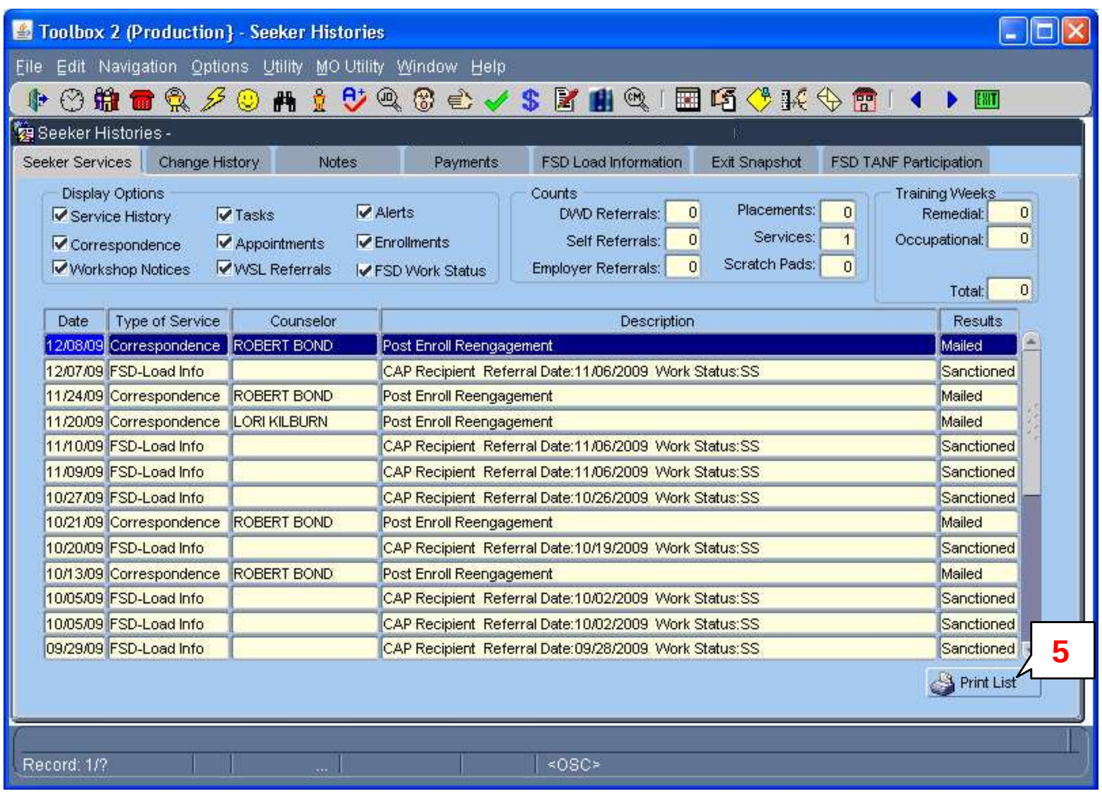


Figure 3: Seeker History Module/Seeker Services Tab/Print List Button

5. For a printable list (Seeker History Individual Transaction) of the **Seeker Services** tab information, click the  button.

12-11-09

Page 1

Seeker History Individual Transaction

5

SSN	Name	Date	Type	Description	Results
602886458	LILIANA AGUIRRE	12/04/08	Corr		
		02/18/09	Corr		
		07/09/09	Corr		
		08/06/09	Corr		
		08/21/09	Corr		
		10/13/09	Corr		
		10/21/09	Corr		
		11/20/09	Corr		
		11/24/09	Corr		
		12/08/09	Corr		
		05/18/09	Serv	Assessment	
		12/02/08	Task	Non-primary counselor added ONET in mediated	N
		12/04/08	Task	Customer Auto-Enrolled in CAP Recipient	Y
		01/15/09	Task	Seeker 602886458 AGUIRRE, LILIANA has a new note.	N
		03/09/09	Task	Seeker 602886458 AGUIRRE, LILIANA has a new note.	N
		03/20/09	Task	Seeker 602886458 AGUIRRE, LILIANA has a new note.	N
		05/18/09	Task	Non-primary counselor added Employment History in mediated Missouri Career Source	Y
		05/26/09	Task	Seeker No, Did Not Attend Workshop- Career Success Strategies (Soft Skills) on 05/26/2009.	N
		08/05/09	Task	Seeker 602886458 AGUIRRE, LILIANA has a new note.	N
		09/16/09	Task	Seeker 602886458 AGUIRRE, LILIANA has a new note.	N
		09/29/09	Task	FSD has started Sanctioning this customer on CAP.	Y
				Total	21

Figure 4: Seeker History Individual Transaction List

<u>Services (Activities)</u>

Entering services into the ‘Employment Plan’ tab.

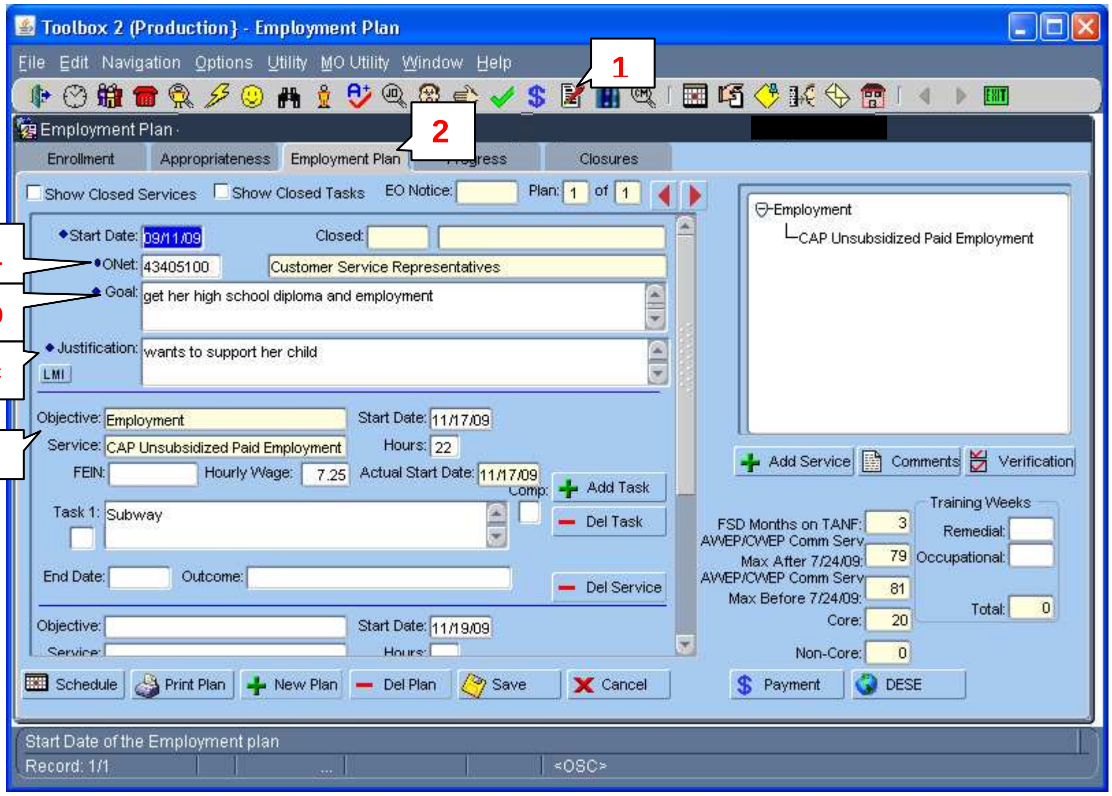


Figure 1: Employment Plan-Enrollment Module/Employment Plan Tab

Step-by-Step:

1. Click on  **Employment Plan/Enrollment** icon.
2. Access the **Employment Plan** tab.
3. Complete the fields of:
   a. **O*Net** (double-click or press the F2 button),
   b. **Goal**, and
   c. **Justification**.
4. Double click in the **Objective** field.

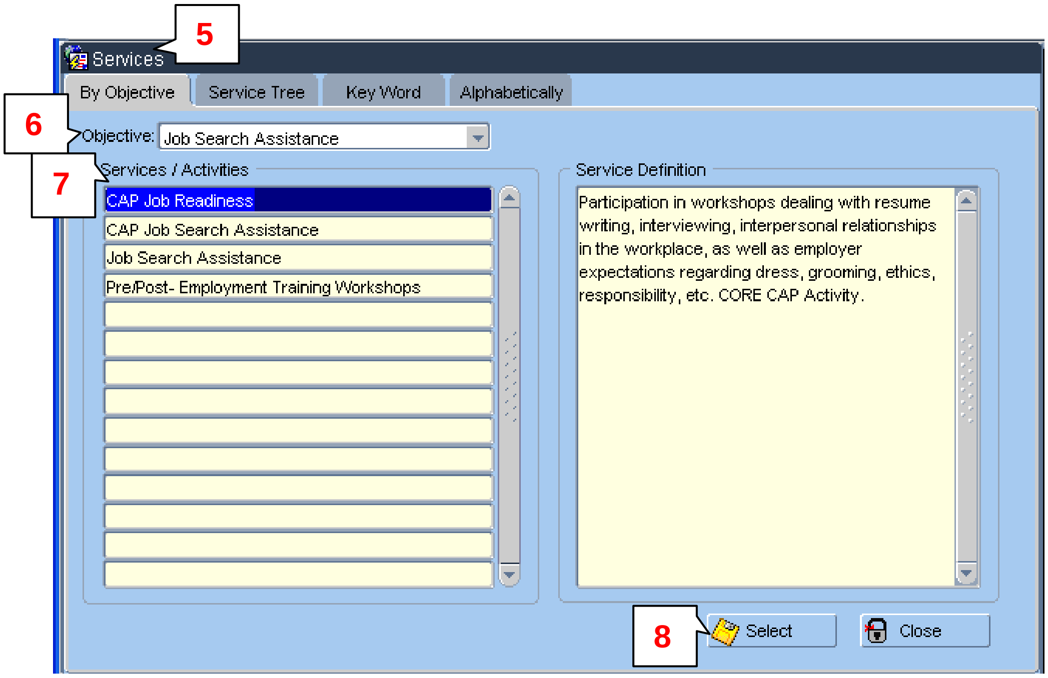
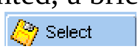


Figure 2: Employment Plan-Enrollment Module/Employment Plan Tab/Services Screen

5. A **Services** screen will pop-up.
6. Select the appropriate **Objective**.
7. A list of **Services/Activities** will appear. Click on the appropriate **Service**. (When a service is highlighted, a brief description will appear in the right field.)
8. Click the 

button. The **Services** screen will close.

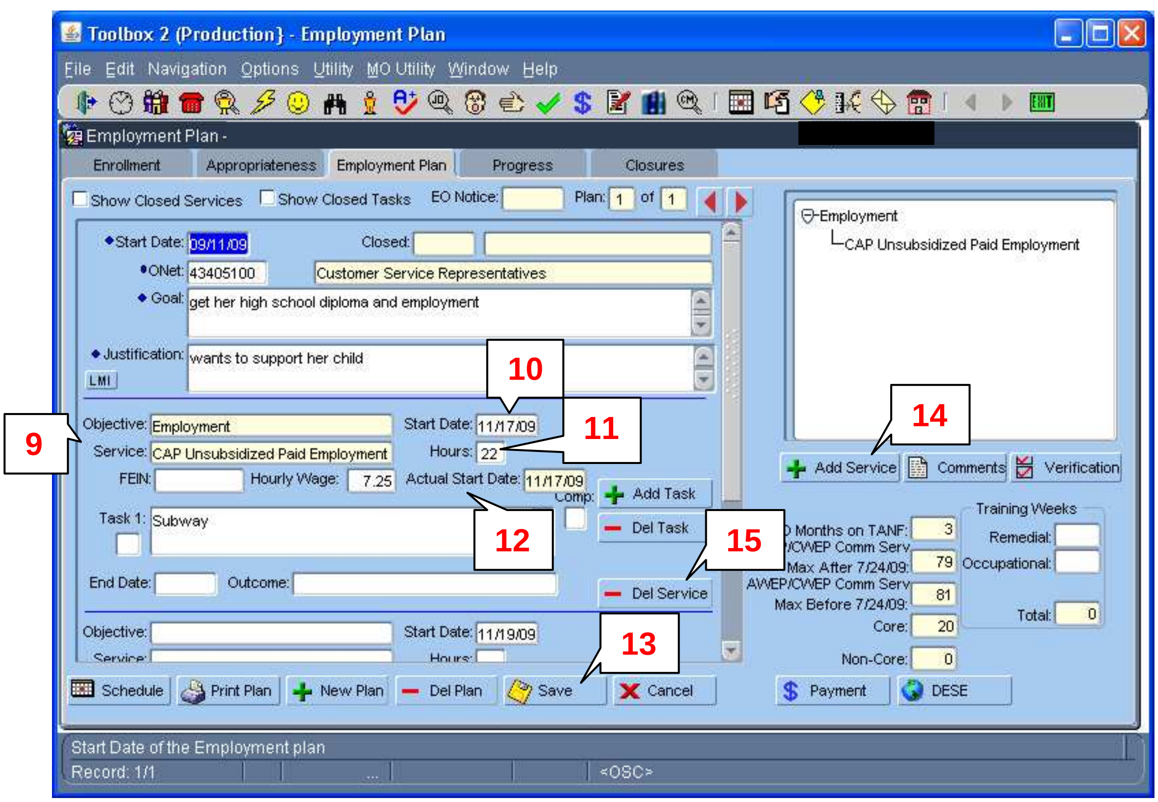
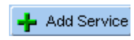


Figure 3: Employment Plan-Enrollment Module/Employment Plan Tab/Services Screen

9. The **Objective** and **Service** fields are completed with the selection made.

10. The **Start Date** field will display the current date. If necessary, change to the correct date.
11. Complete the **Hours** field.
12. Enter an **Actual Start Date**, if applicable, to allow the service to display on the 'Verification' screen for entry of actual hours. [The CAP services that do not require an **Actual Start Date** are 'CAP Assessment', 'CAP Conciliation', 'CAP Trial Participation', and 'CAP Temporary Waivers'.] The **Actual Start Date** must be equal to or after the **Start Date**.
13. Click the 

button.
14. If the Employment Plan tab is full, you can press the 

button to add additional 'objective' and 'service' fields.
15. If a service is entered in error, you can press the 

button to delete the service on the same day it was entered.

Pre-Enrollment Conciliation Service

Entering a ‘Pre-Enrollment Conciliation’ service for Possible CAP Recipients and Possible CAP Voluntary Recipients.

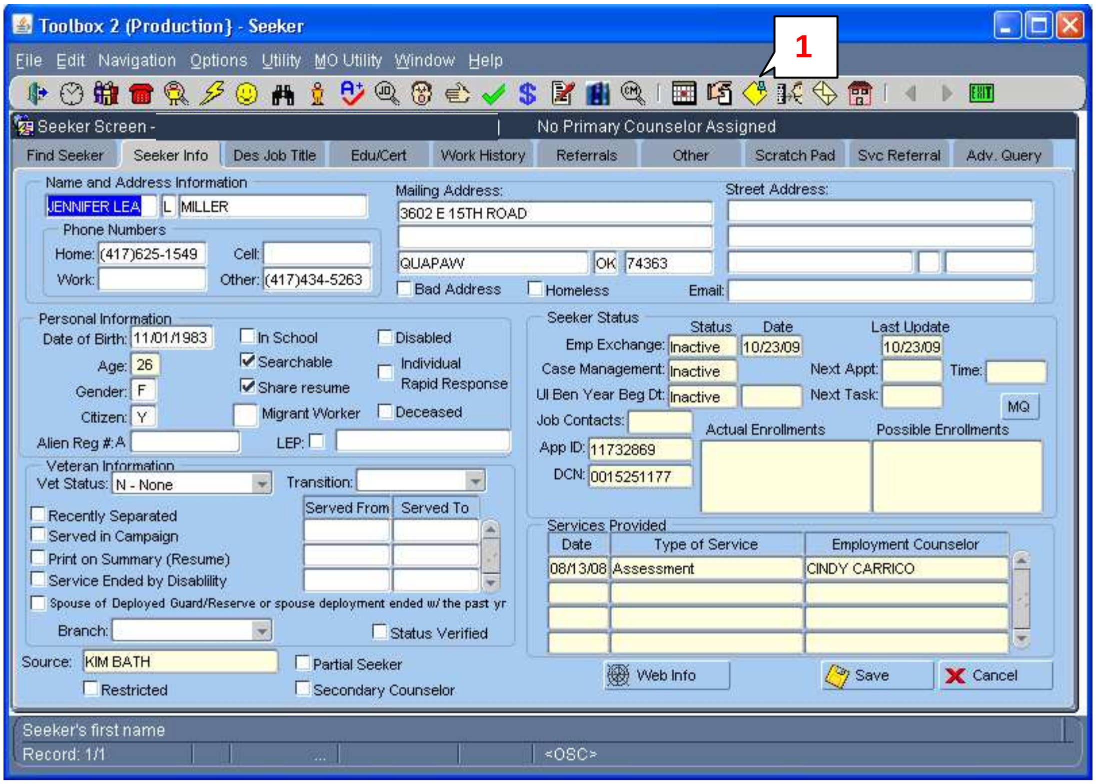


Figure 1: Notes Module

Step-by-Step:

1. Click on  **Notes** icon.

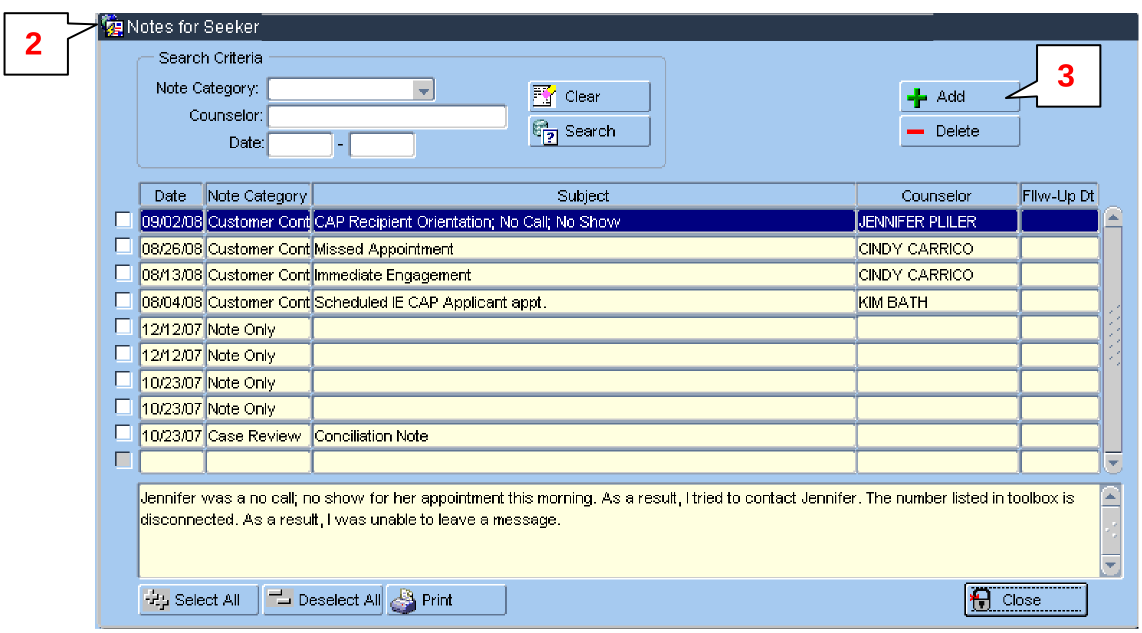
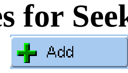


Figure 2: Notes for Seeker Screen

2. The **Notes for Seeker** screen will pop-up.
3. Click the  button.

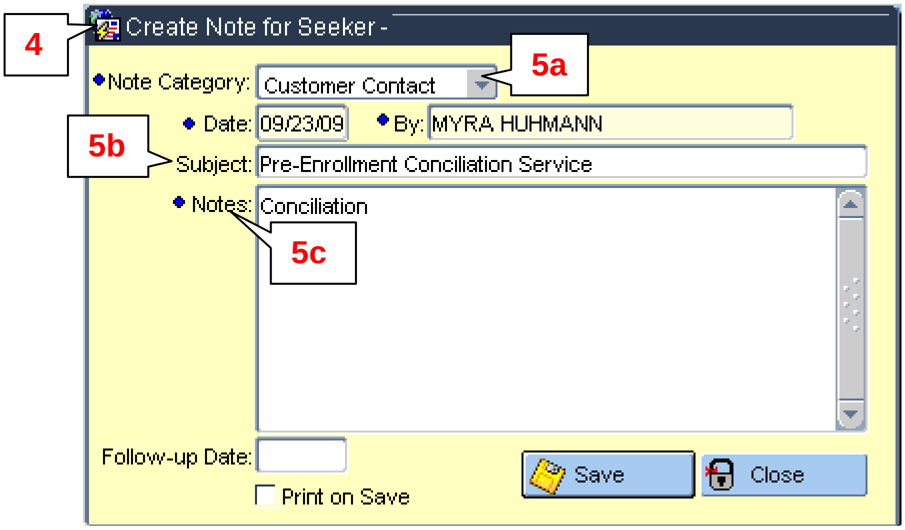


Figure 3: Create Note for Seeker Screen

4. The **Create Note for Seeker** screen will pop-up.
5. In order for the 'Pre-Enrollment Conciliation Service' to be sent to FSD to generate reports on recipient activities, you must complete the case note as shown above in Figure 3. (Conciliation is not a countable activity for the federal work participation rate.)
   a. In the **Note Category**, select **Customer Contact** from the drop down menu.
   b. Enter **Pre-Enrollment Conciliation Service** in the **Subject** field.
   c. In the **Notes** field, enter **Conciliation**.

Note: The 'Pre-Enrollment Conciliation Service' will remain open and sent to FSD until: 1) The 'Recommend Sanction be Lifted' alert is sent to FSD; 2) The Recipient is enrolled into CAP; or 3) A 'ZZ' referral is received from FSD.

<u>Teen Parent</u>

Identifying a teen parent.

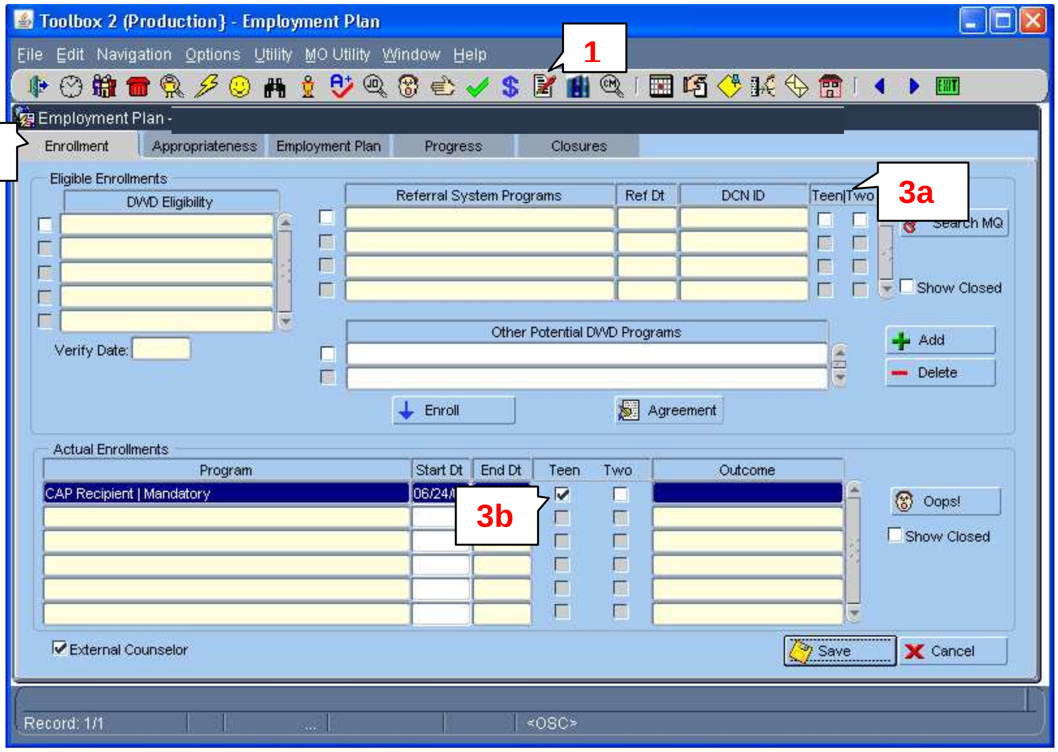


Figure 1: Employment Plan-Enrollment Module/Enrollment Tab

Step-by-Step:

1. Click on  **Employment Plan/Enrollment** icon.
2. The **Enrollment** tab will display.
3. There are two fields (if either is checked) that identify the client as a **<u>Teen Parent</u>** that are located under:
    a. **Referral System Programs**
    b. **Actual Enrollments**

Teen Parent

Sending a 'Teen Parent in an Educational Activity' alert to FSD for TA recipients. (This alert is not sent for TA applicants since FSD will be given this information at application.)

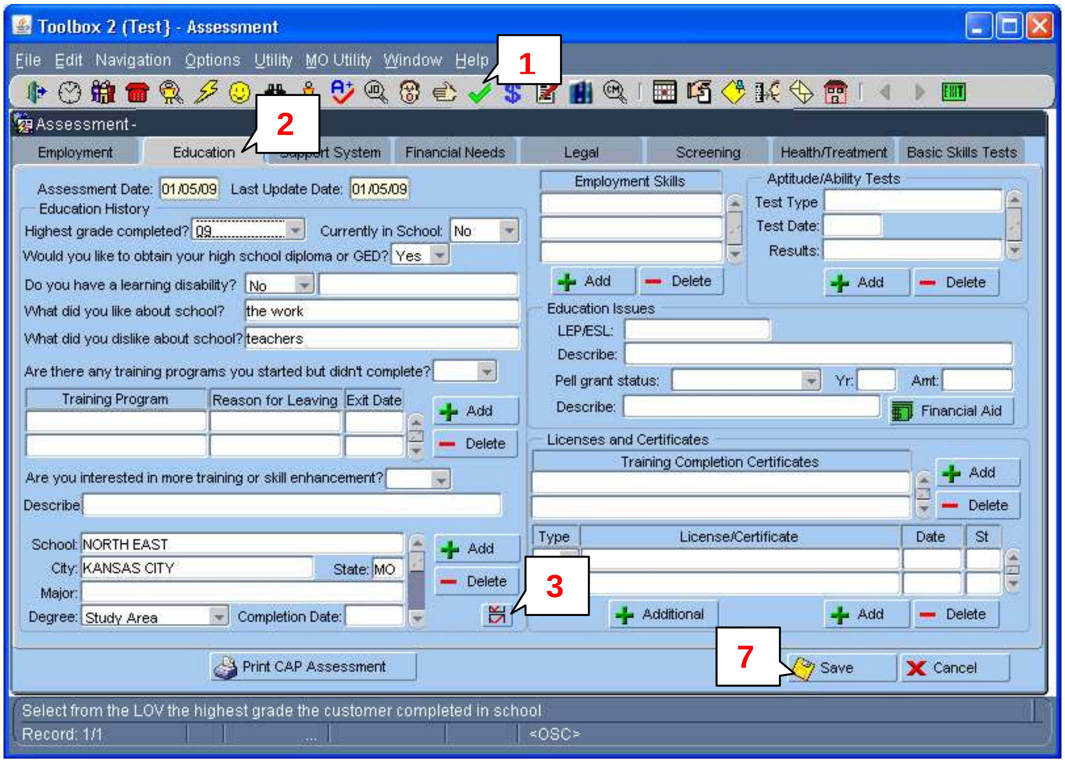


Figure 1: Assessment Module/Education Tab

Step-by-Step:

1. Click on  **Assessment** icon.
2. Click on the **Education** tab.
3. Click on the  button to access the **School Information Screen**.

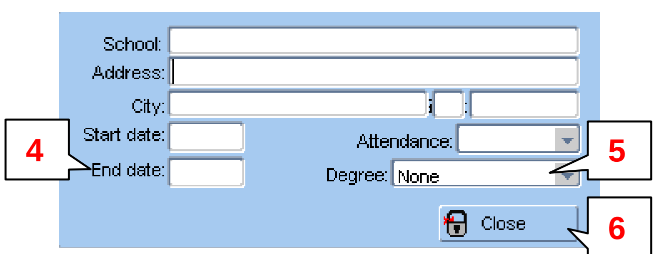
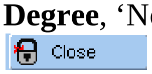


Figure 2: School Information Screen

4. All fields except **End Date** must be completed in order to send the alert. [The **Start Date** must be completed in a mm/dd/yy format.]
5. For the field **Degree**, 'None' must be selected.
6. Click on the 

button to exit the screen.
7. Once back on the **Education** tab, click on the 

button to save the information and to send the alert to FSD. This alert will write to the **Seeker Services** tab within the **Seeker History** module.

> **NOTE:** This alert notifies FSD the teen parent is in school so the months while (s)he is in school does not count toward the TA 60-month lifetime limit.

Teen Parent

Sending a 'Teen Parent Not in an Educational Activity' alert to FSD. This alert should only be sent if a Teen Parent had been participating in an education activity and then chose to no longer continue.

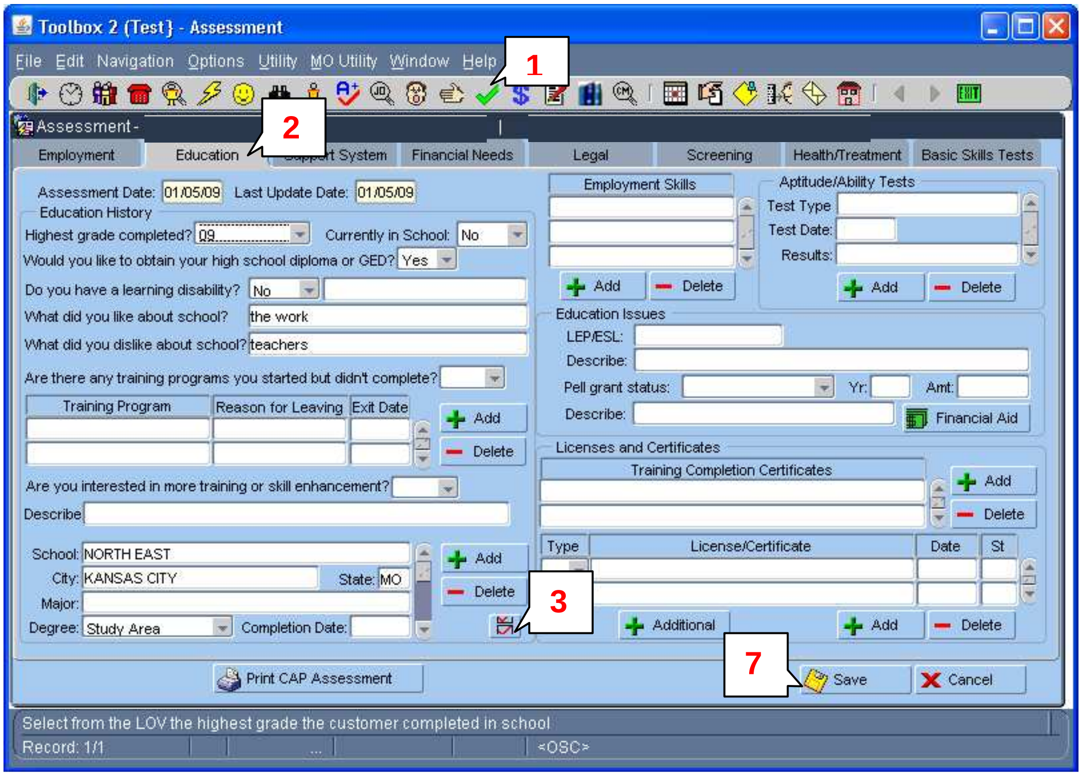


Figure 1: Assessment Module/Education Tab

Step-by-Step:

1. Click on **Assessment** icon.
2. Click on the **Education** tab.
3. Click on the to access the **School Information Screen**.

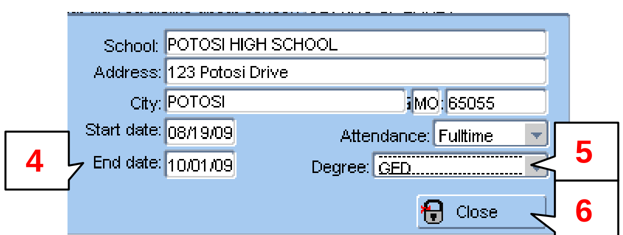


Figure 2: School Information Screen

4. Complete the **End Date** (mm/dd/yy format) field.
5. Update the **Degree** field if appropriate. For the **Degree** field, 'None' can be selected if no degree was obtained. All noted fields must be completed in order to send the alert. [The fields **School**, **Address**, **City**, **Start Date**, and **Attendance** should already be complete from original alert.]
6. Click on the Close button to exit the screen.
7. Once back on the **Education** tab, click on the Save button to save the information and to send the alert to FSD. This alert will write to the **Seeker Services** tab within the **Seeker History** module.

NOTE: This alert notifies FSD the teen parent is no longer in school and that TA received should count toward the 60-month lifetime limit.

TRE Payments

Authorizing a one-time TRE payment for applicants.

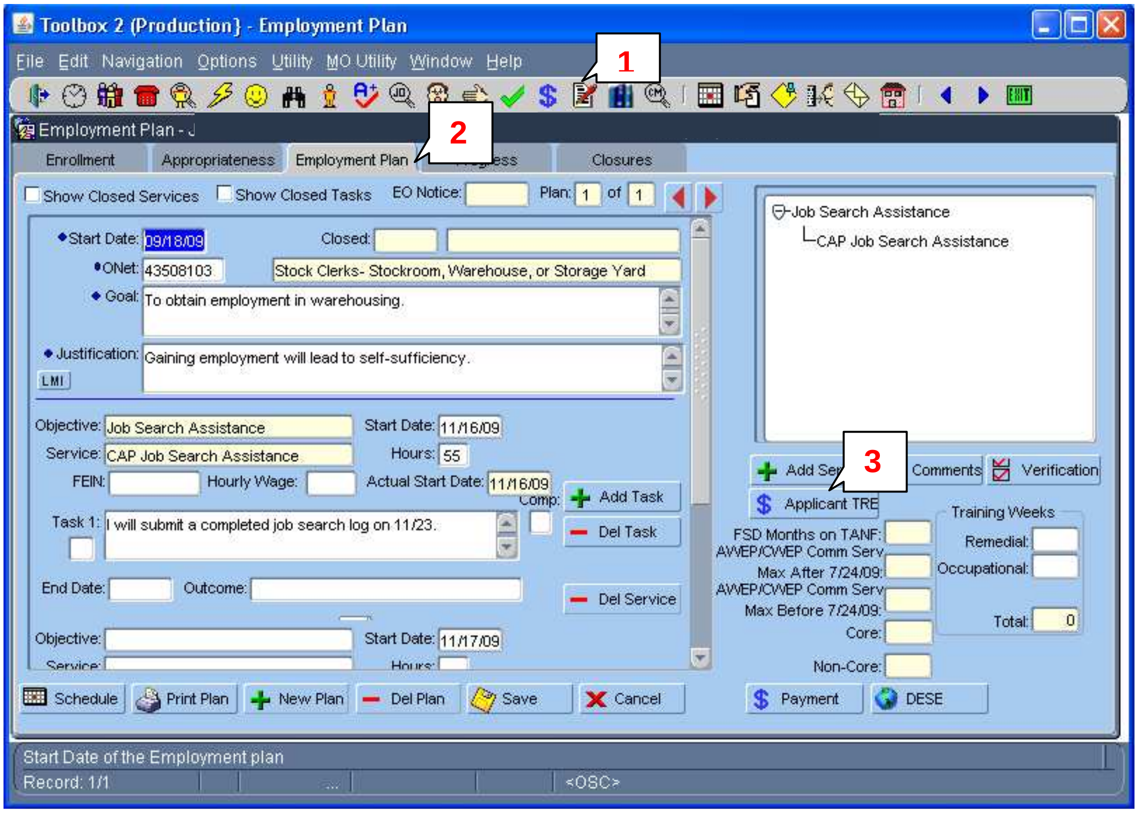


Figure 1: Employment Plan-Enrollment Module/Employment Plan Tab

Step-by-Step:

1. Click on the **Employment Plan/Enrollment** icon.
2. Click on the **Employment Plan** tab.
3. To issue applicant TRE, click the Applicant TRE button.

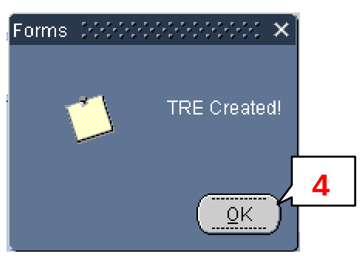


Figure 2: Applicant TRE Screen

4. To confirm payment, click the OK button.

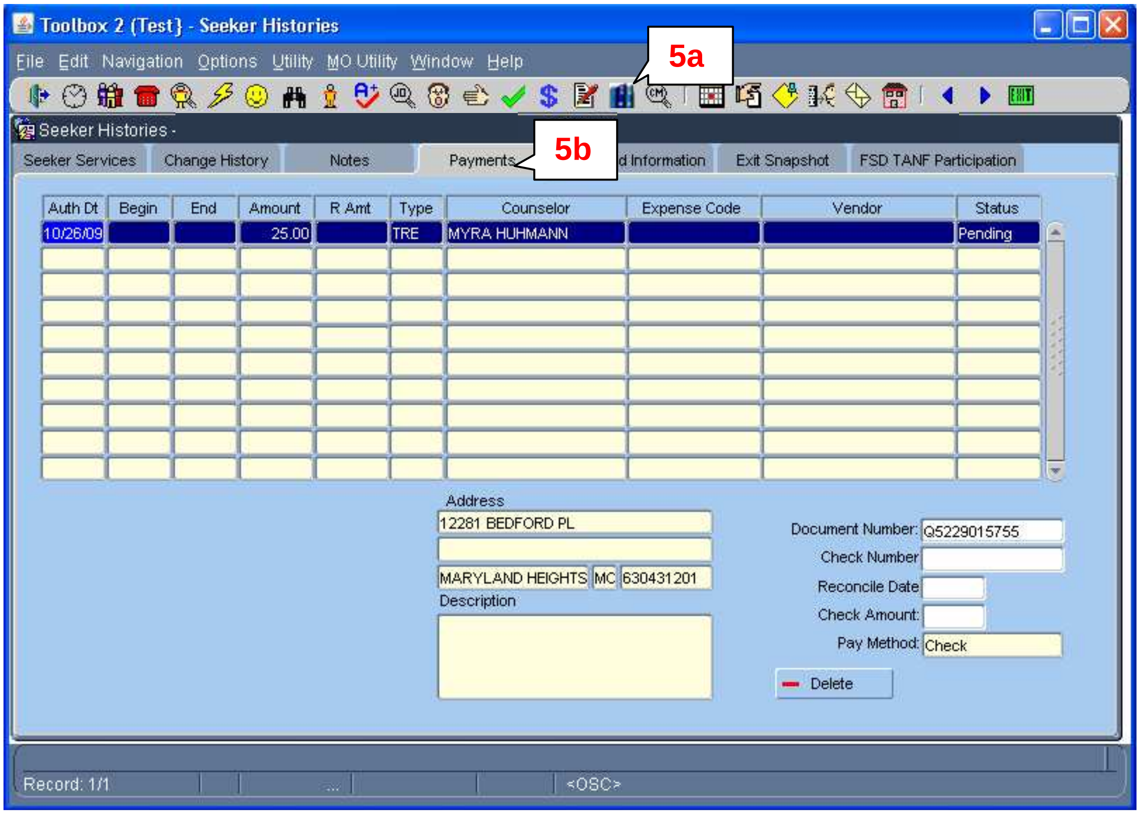


Figure 3: Seeker History Module/Payments Tab

5. To verify the payment was issued:
    a. Click the  **Seeker History** icon.
    b. Click on the **Payments** tab. (The **Status** will remain 'Pending' until the TRE is paid, based on the TRE Payment Schedule.)

TRE Payments

Authorizing TRE payments for recipients.

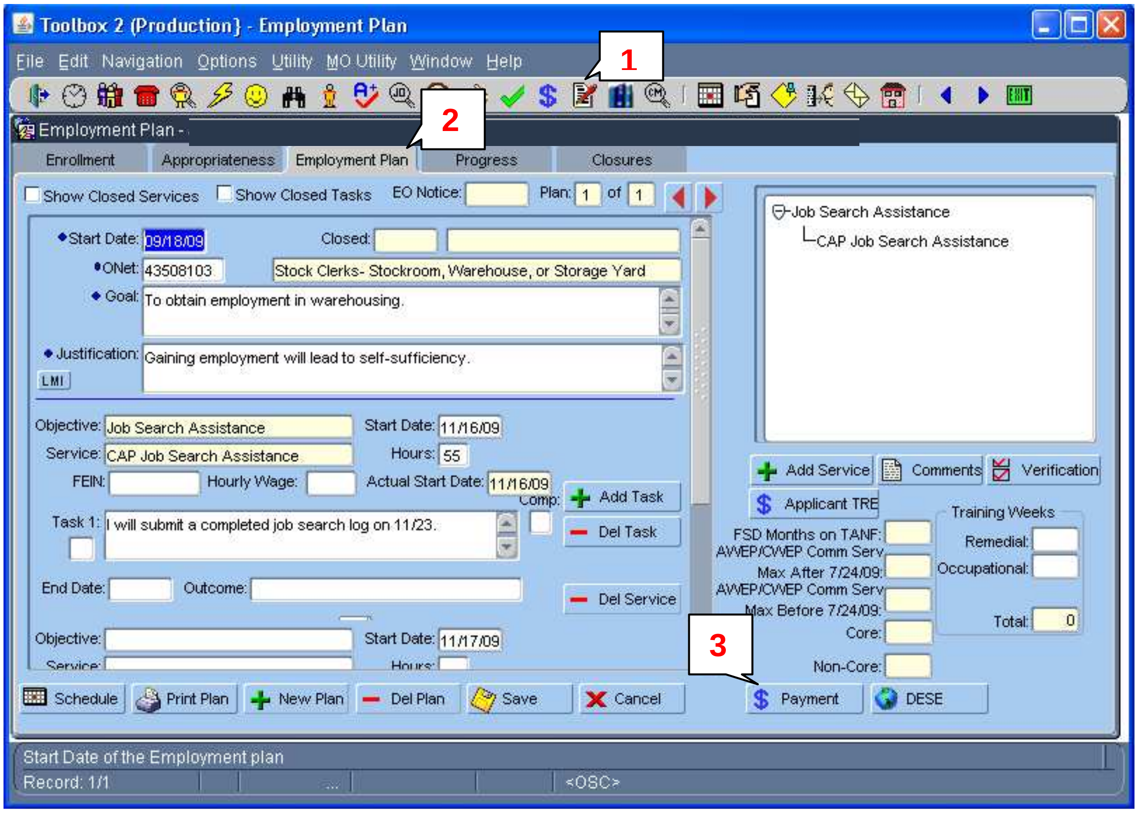


Figure 1: Employment Plan-Enrollment Module/Employment Plan Tab

Step-by-Step:

1. Click on **Employment Plan/Enrollment** icon.
2. Click on the **Employment Plan** tab.
3. Click the Payment button to access the Payments screen.

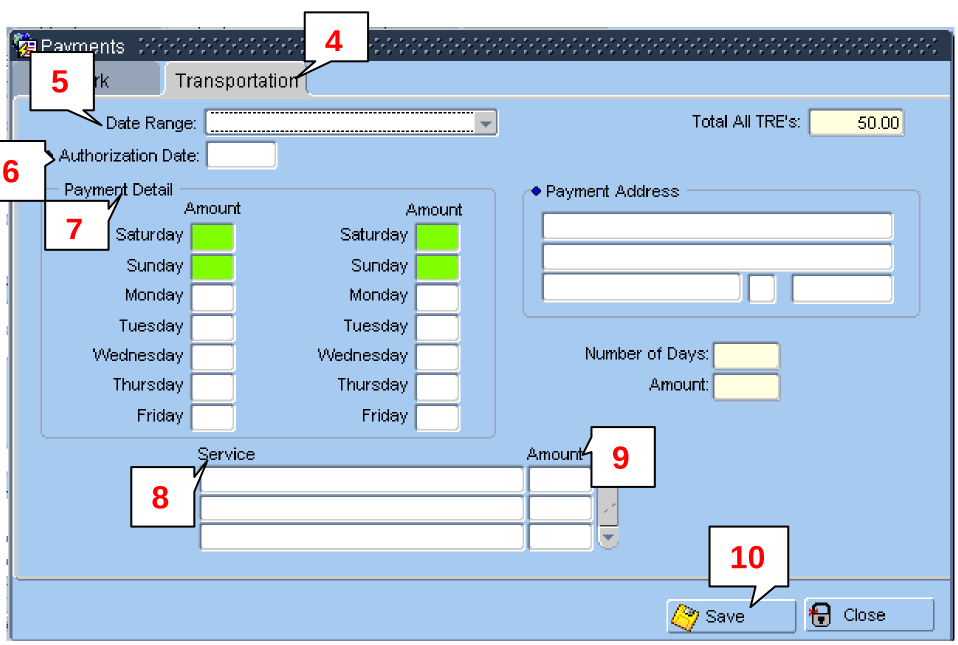


Figure 2: Payments Screen/Transportation Tab

4. Select the **Transportation** tab.
5. In the **Date Range** field, select the week TRE should be paid for from the drop-down menu.
6. Once a date range is selected, the **Authorization Date** field will populate with the current date.
7. In the **Payment Detail** (date) fields, enter the appropriate amount of TRE, up to the $5 maximum, for each eligible day. The dates will populate to the screen, once you have selected the appropriate two-week payment period. (A TRE payment should not be entered for a particular day unless the recipient was in a CAP service for that day and was meeting requirements according to the “TRE” policy.)
8. Double click in the **Service** field(s) to access a list of CAP services available to link to the TRE payment.
9. Enter the amount of the TRE associated with the service into the **Amount** field.
10. Click the 

button.

NOTE: The **Total All TRE’s** field indicates the total amount of TRE authorized and sent to the client to date.

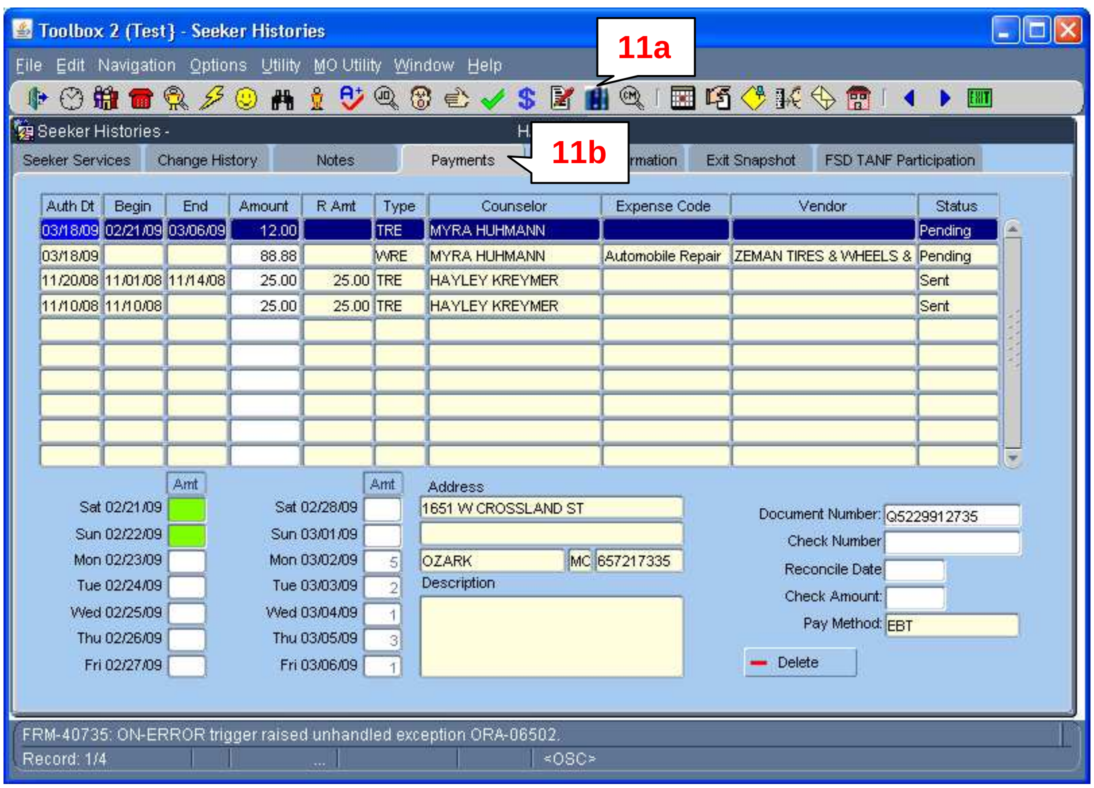


Figure 3: Seeker History Module/Payments Tab

11. To verify the payment was issued:
    a. Click the  **Seeker History** icon.
    b. Click the **Payment** tab. (The **Status** will remain ‘Pending’ until the TRE payment is sent to the EBT card, which is 1 week prior to the money being available on the EBT card.)

Two-Parent Button

Identifying a TA applicant or recipient as part of a two-parent household.

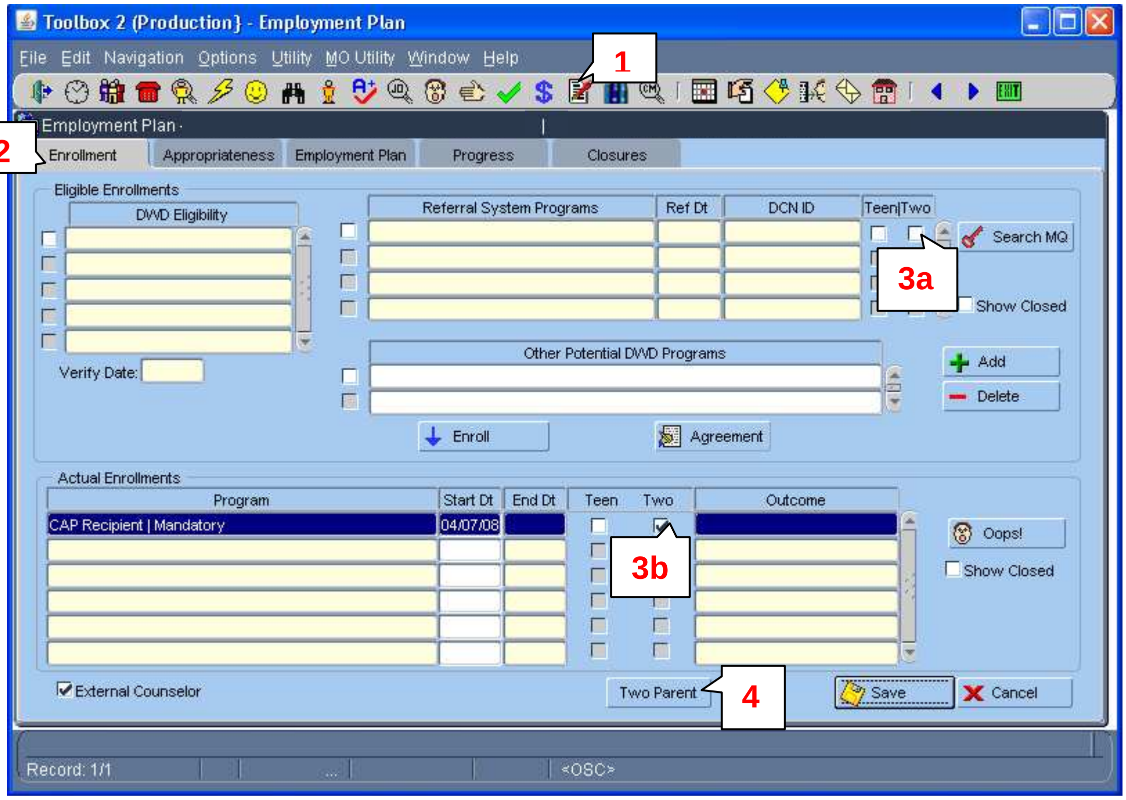


Figure 1: Employment Plan-Enrollment Module/Enrollment Tab

Step-by-Step:

1. Click on **Employment Plan/Enrollment** icon.
2. The **Enrollment** tab will display.
3. There are two fields that identify the TA applicant or recipient as a part of a **<u>Two Parent</u>** household under:
   a. **Referral System Programs**
   b. **Actual Enrollments**
4. There is a Two Parent button, to switch between the TA applicant or recipient and the other parent.

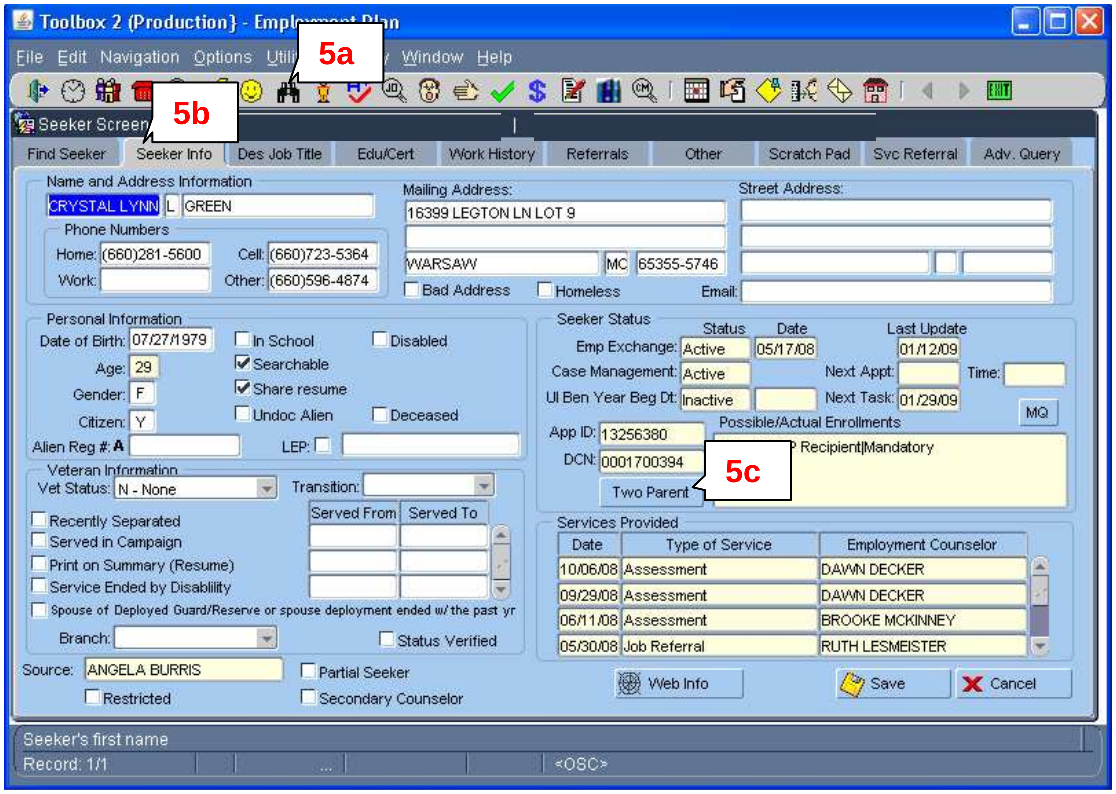


Figure 2: Find Seeker Module/Seeker Info Tab

5. To locate the other two-parent button,
   a. **Find Seeker** ,
   b. **Seeker Info tab**, and
   c. Two Parent button.

Entering the Default O*Net Code for Two-Parent Households

Using the default O*Net code (10-0000.00) when a two-parent household is referred to CAP for Immediate Engagement and only one parent complies. Also applies to conversion records. This information is also explained in the 'Default O*Net Policy'.

If approved for TA, both recipients will be referred to CAP (unless one or both meet an exemption/exclusion). In order to enter the 'CAP Conciliation' service on the Employment Plan tab for the parent who did not comply, the O*Net code field must be completed with the Generic O*Net code.

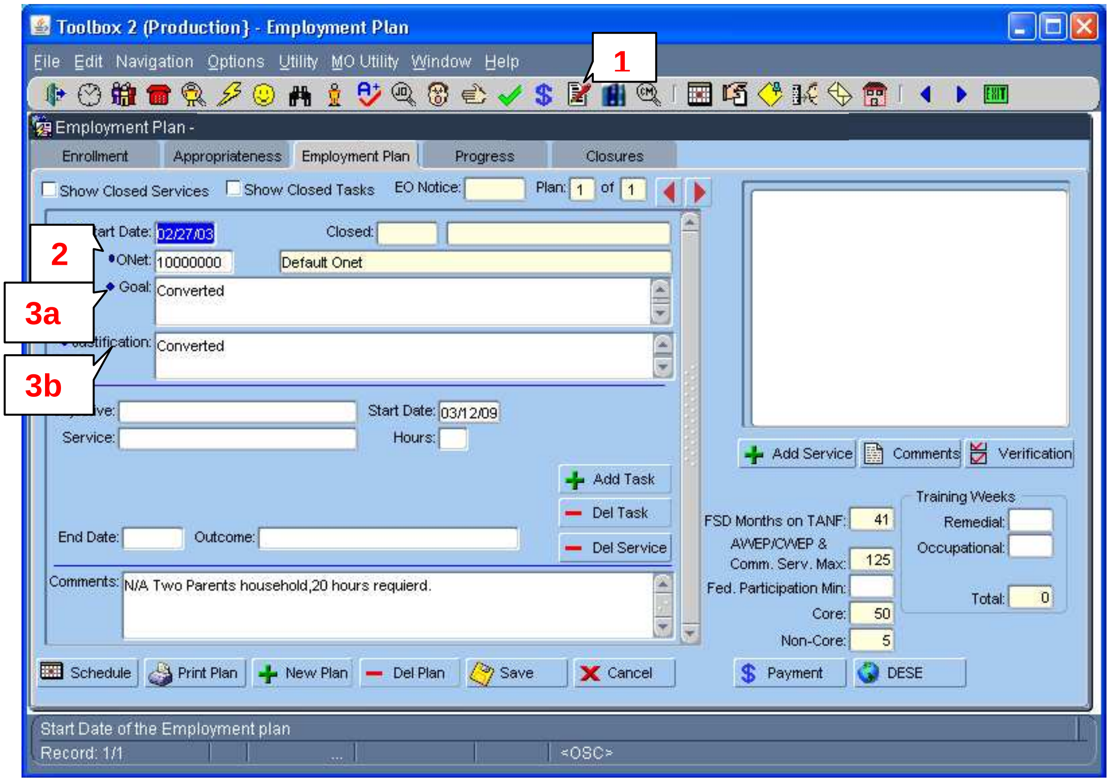


Figure 1: Employment Plan-Enrollment Module/Enrollment Tab

Step-by-Step:

1. Click on  **Employment Plan/Enrollment** icon.
2. On the **Enrollment** tab, enter **<u>10-0000.00</u>** into the **ONet** field.
3. Replace the word 'Converted' with 'Conciliation' in the:
   a. **Goal** field and
   b. **Justification** field.

Verification Screen

Actual, projected, excused, and holiday hours are entered on the 'Verification' screen. Hours for the 1st through the 15th of the month must be entered no later than the 30th of the month. Hours for the 16th through the 16th through the end of the month must be entered no later than the 15th of the following month. For complete instructions, refer to the "CAP Actual Hours" document on WorkSmart at https://worksmart.ded.mo.gov, 'Services/Programs', 'CAP/TANF', and 'Memos/Letters/Info Alert'.

> **NOTE:** The 'Client Mass Verification Entry' screen located under the 'Options' menu is only used as a tool to review hours entered for a case load. Do **not** use this screen for entry of actual hours.

Verification Screen (Actual Hours)

Below are instructions for entering actual hours.

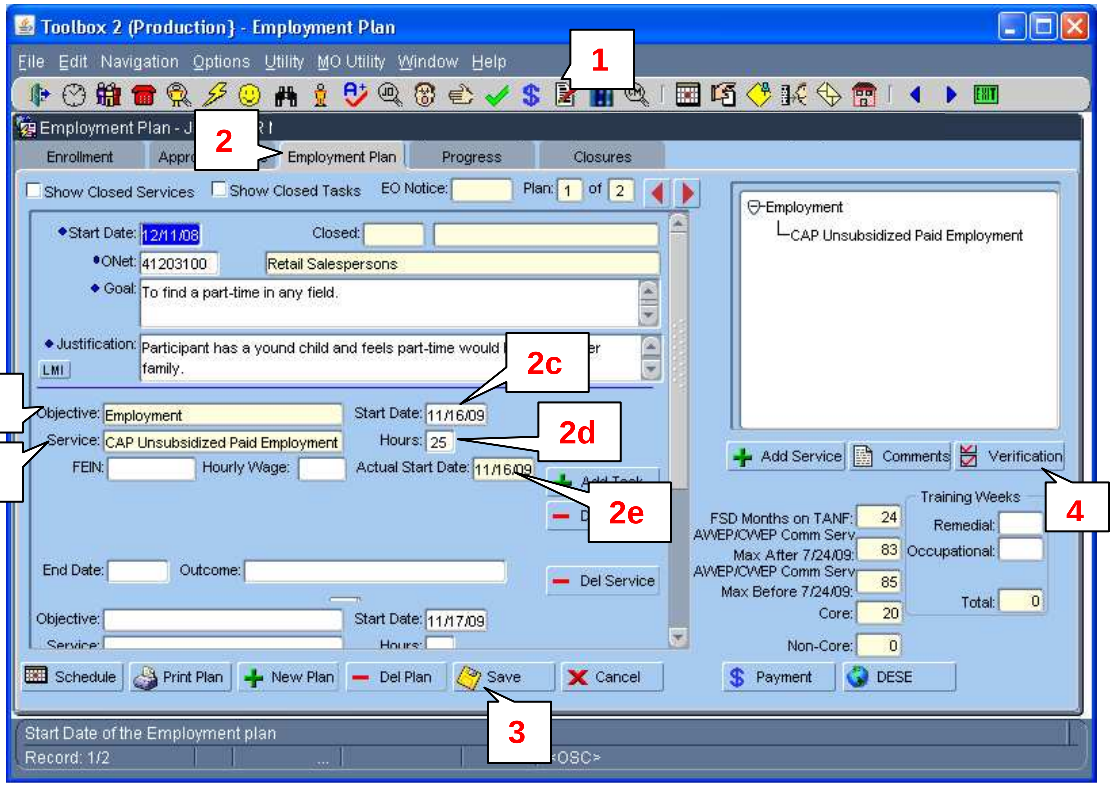


Figure 1: Employment Plan-Enrollment Module/Employment Plan Tab

Step-by-Step:

1. Click on **Employment Plan/Enrollment** icon.
2. Click on the **Employment Plan** tab and complete the fields of:
   a. Objective,
   b. Service,
   c. Start Date,
   d. Hours, and
   e. Actual Start Date.
3. Click the Save button.
4. Click on the Verification button to access the 'Verification' screen.

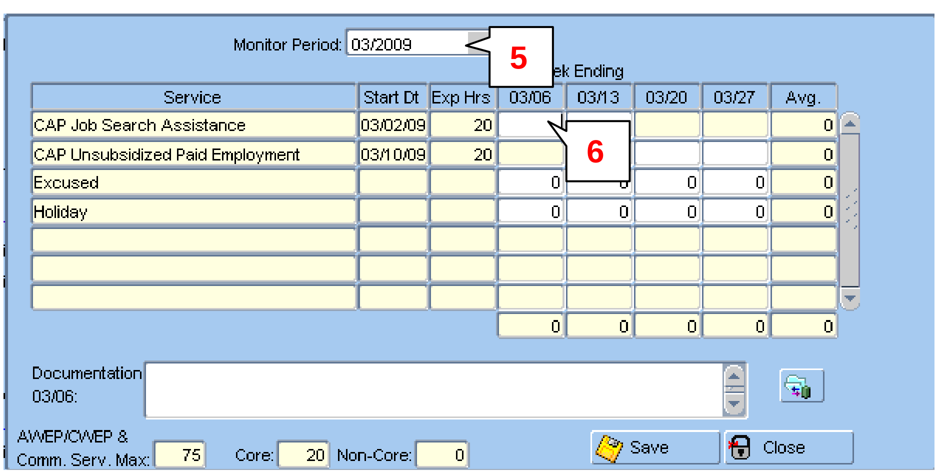


Figure 2: Verification Screen

5. From the **Monitor Period** field, select the appropriate month that you are going to enter hours.
6. To enter **actual hours** for a service (example CAP Job Search Assistance), double click in the desired **Week Ending** date field. [The system only allows access to Week Ending Date fields for dates within the services Start and End dates.]

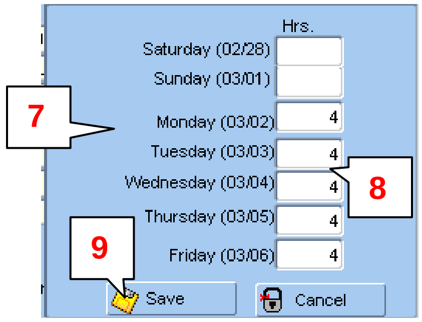


Figure 3: Daily Fields Screen

7. The week displays.
8. Enter hours into the appropriate days.
9. Click the Save button to save the hours entered, close the screen.

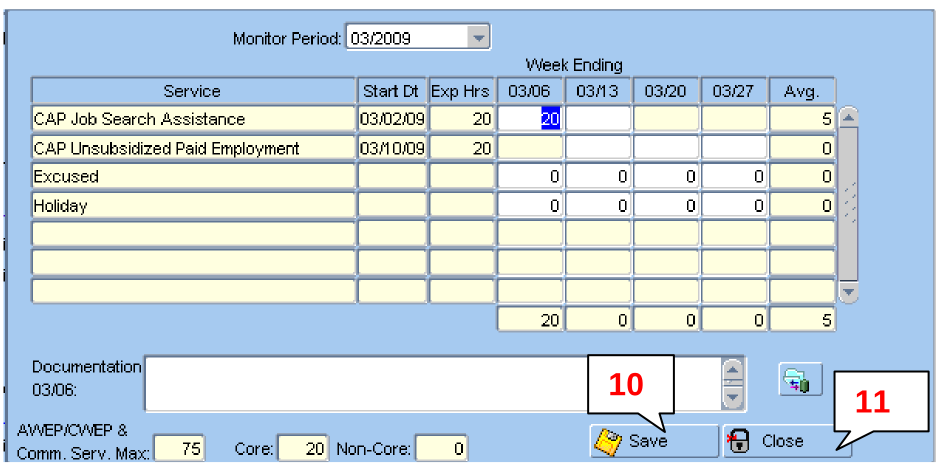


Figure 4: Verification Screen

10. Once all hours are entered for the month, click the Save button.
11. Click the Close button to close the screen.

Verification Screen (Projected Hours)

Below are instructions for entering projected hours for paid activities.

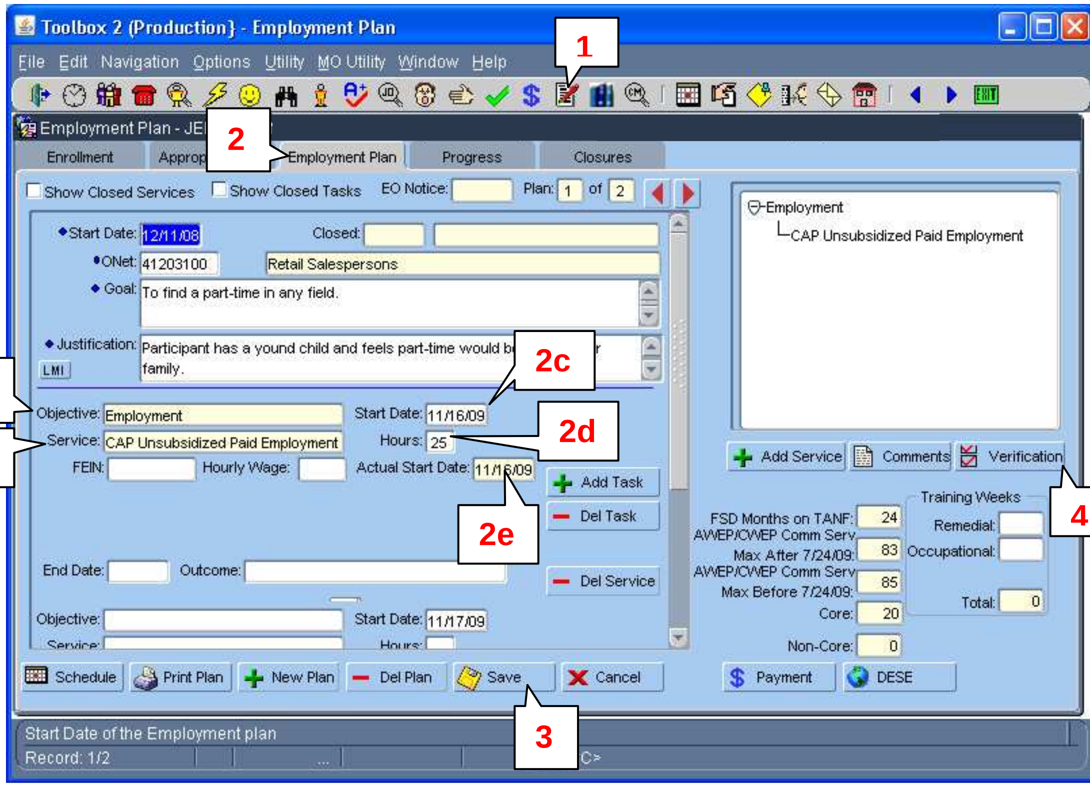


Figure 1: Employment Plan-Enrollment Module/Employment Plan Tab

Step-by-Step:

1. Click on **Employment Plan/Enrollment** icon.
2. Click on the **Employment Plan** tab and complete the fields of:
   a. Objective,
   b. Service,
   c. Start Date,
   d. Hours, and
   e. Actual Start Date.
3. Click the Save button.
4. Click on the Verification button to access the ‘Verification’ screen.

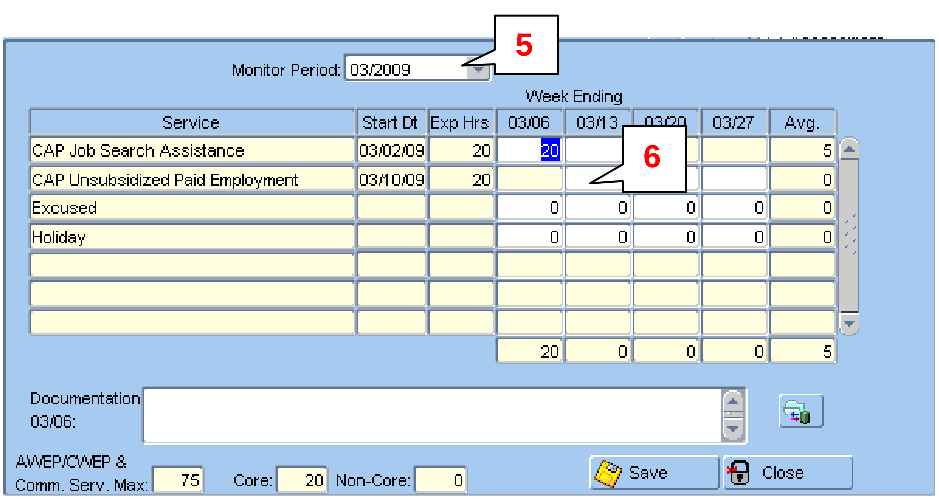


Figure 2: Verification Screen

5. From the **Monitor Period** field, select the appropriate month that you are going to enter hours.
6. To enter projected hours for a service (example CAP Unsubsidized Employment), double click in the desired **Week Ending** date field. [The system only allows access to Week Ending Date fields for dates within the services Actual Start and End dates.]

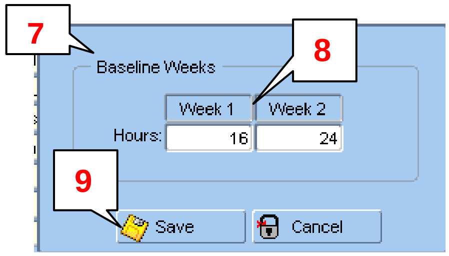
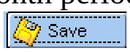


Figure 3: Baseline Weeks Screen

7. The **Baseline Weeks** display.
8. Enter the number of hours worked in the first and second week of employment as the "baseline". If you only have one week of documentation, enter the same number for both weeks. [The "baseline" entry automatically averages and projects hours for the remainder of the six-month period.]
9. Click the  button to save the hours entered and close the screen.

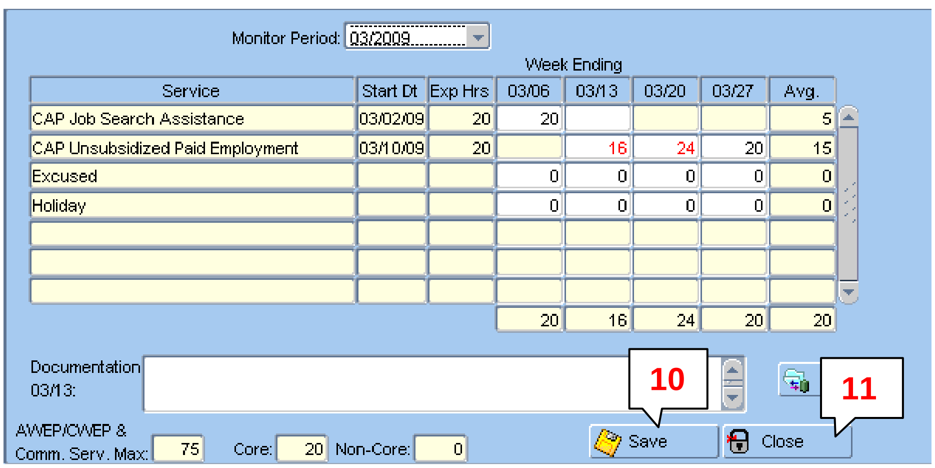
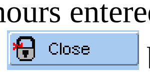


Figure 4: Verification Screen

10. On the 'Verification' screen, the baseline hours appear in red. Click the  button to save the hours entered.
11. Click the  button to close the screen.

Verification Screen (Self-Employment)

Below are instructions for entering self-employment hours.

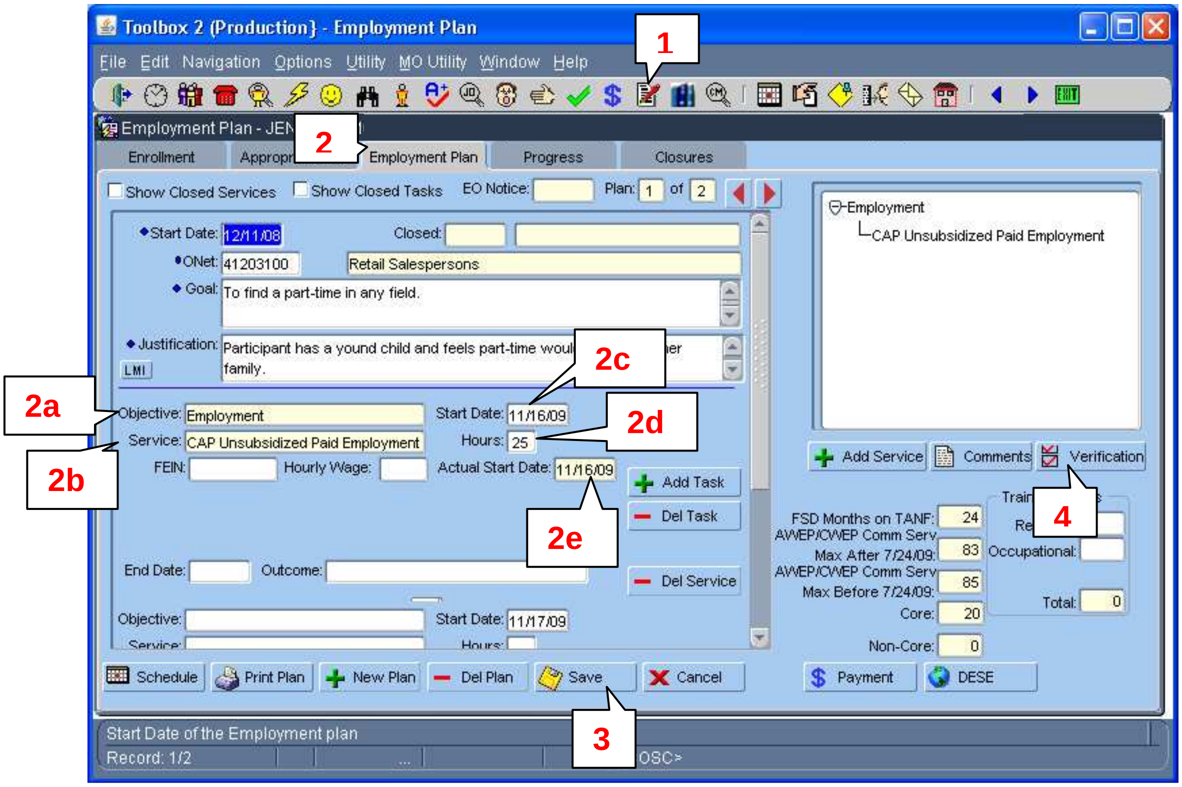


Figure 1: Employment Plan-Enrollment Module/Employment Plan Tab

Step-by-Step:

1. Click on **Employment Plan/Enrollment** icon.
2. Click on the **Employment Plan** tab and complete the fields of:
    a. Objective,
    b. Service,
    c. Start Date,
    d. Hours, and
    e. Actual Start Date.
3. Click the Save button.
4. Click on the Verification button to access the 'Verification' screen.

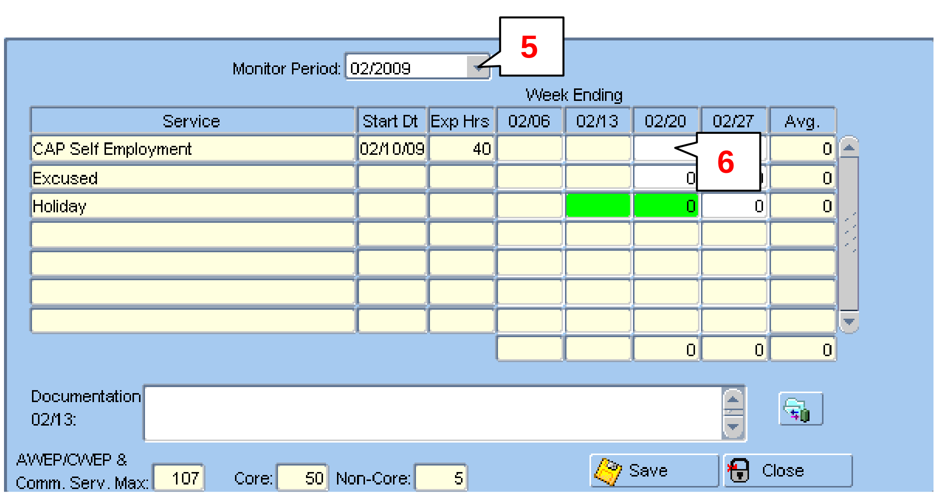


Figure 2: Verification Screen

5. From the **Monitor Period** field, select the appropriate month that you are going to enter hours.
6. To enter projected hours for a CAP Self Employment, double click in the desired **Week Ending** date field. [The system only allows access to Week Ending Date fields for dates within the services Actual Start and End dates.]

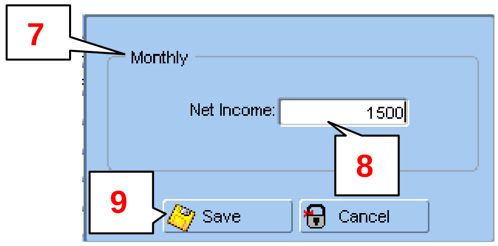


Figure 3: Monthly Net Income Screen

7. The **Monthly** screen will display.
8. Enter the applicant's or recipient's monthly net income. [The monthly net income divided by the federal minimum wage (currently $7.25) divided by the average number of federal weeks (4.3) in the month will project the applicant's or recipient's hours for the next six months.]
9. Click the 

button to save the entered income, close the screen, and return to the 'Verification' screen.

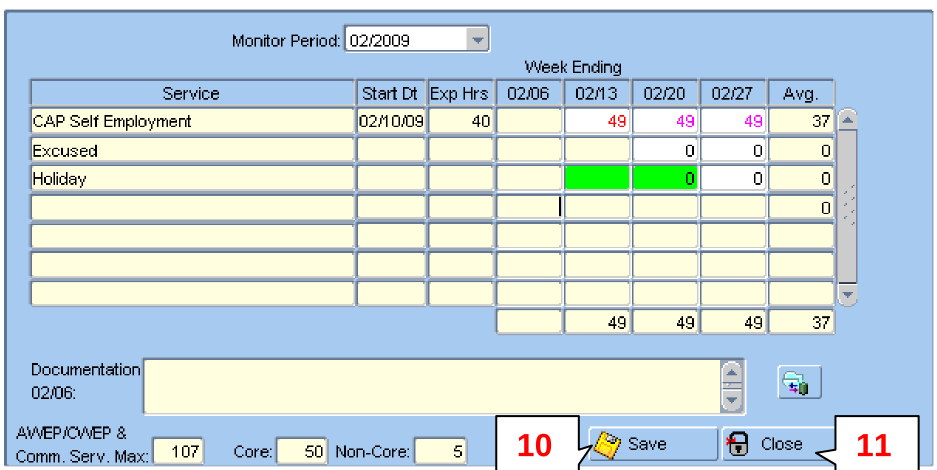
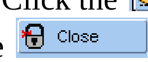


Figure 4: Verification Screen

10. On the 'Verification' screen, the baseline hours appear in red and the projected hours appear in pink. Click the 

button.
11. Click the 

button.

Verification Screen (Excused Absences/Holiday)

Below are instructions for entering excused absences and holiday for unpaid activities.

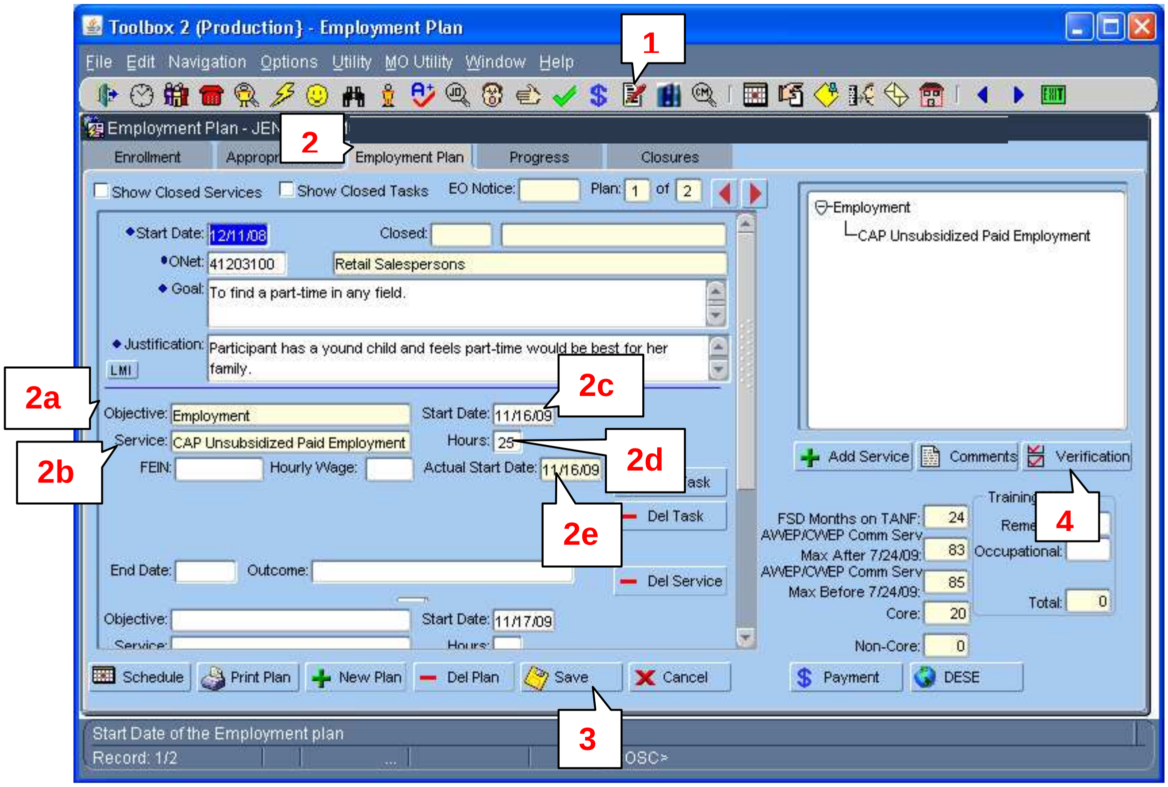


Figure 1: Employment Plan-Enrollment Module/Employment Plan Tab

Step-by-Step:

1. Click on **Employment Plan/Enrollment** icon.
2. Click on the **Employment Plan** tab and complete the fields of:
   a. Objective,
   b. Service,
   c. Start Date,
   d. Hours, and
   e. Actual Start Date.
3. Click the Save button.
4. Click on the Verification button to access the 'Verification' screen.

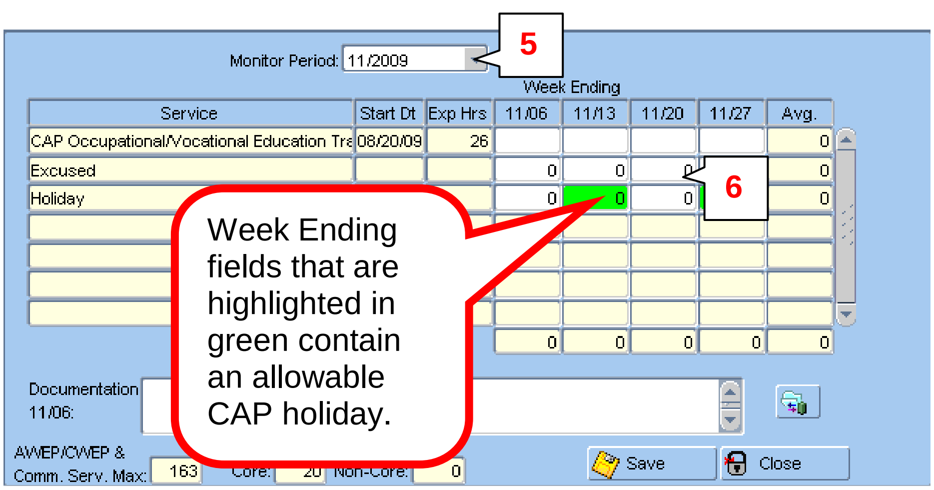


Figure 2: Verification Screen

5. From the **Monitor Period** field, select the appropriate month that you are going to enter hours.
6. To enter hours for Excused Absences or Holidays, double click in the desired **Week Ending** date field. [The system only allows access to Week Ending Date fields for dates within the services Actual Start and End dates.]

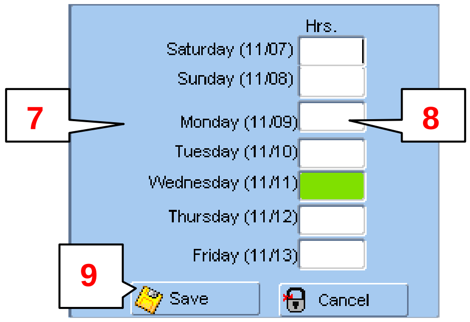


Figure 3: Daily Fields Screen

7. This will bring up a screen of daily fields corresponding the Week Ending date.
8. Enter hours into the appropriate daily field(s).
9. Click the  button to save the hours entered and close the screen.

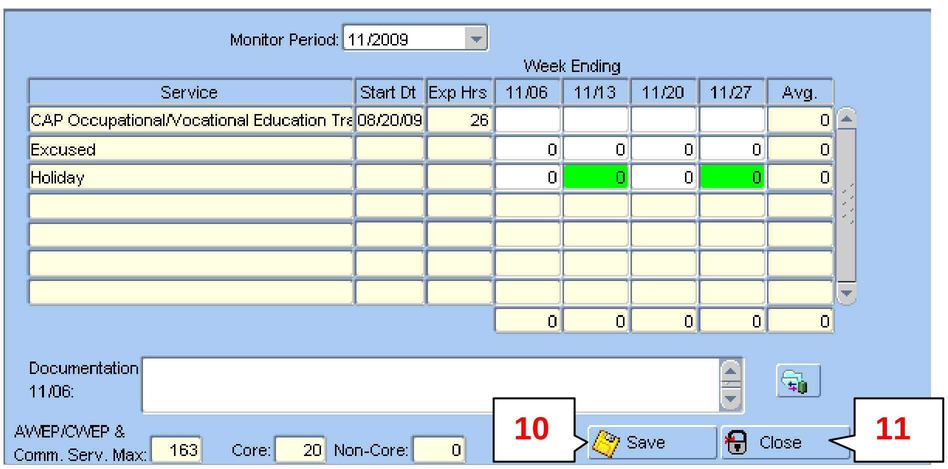
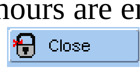


Figure 4: Verification Screen

10. Once all hours are entered for the month, click the  button.
11. Click the  button.

Work History

Entering a Work History.

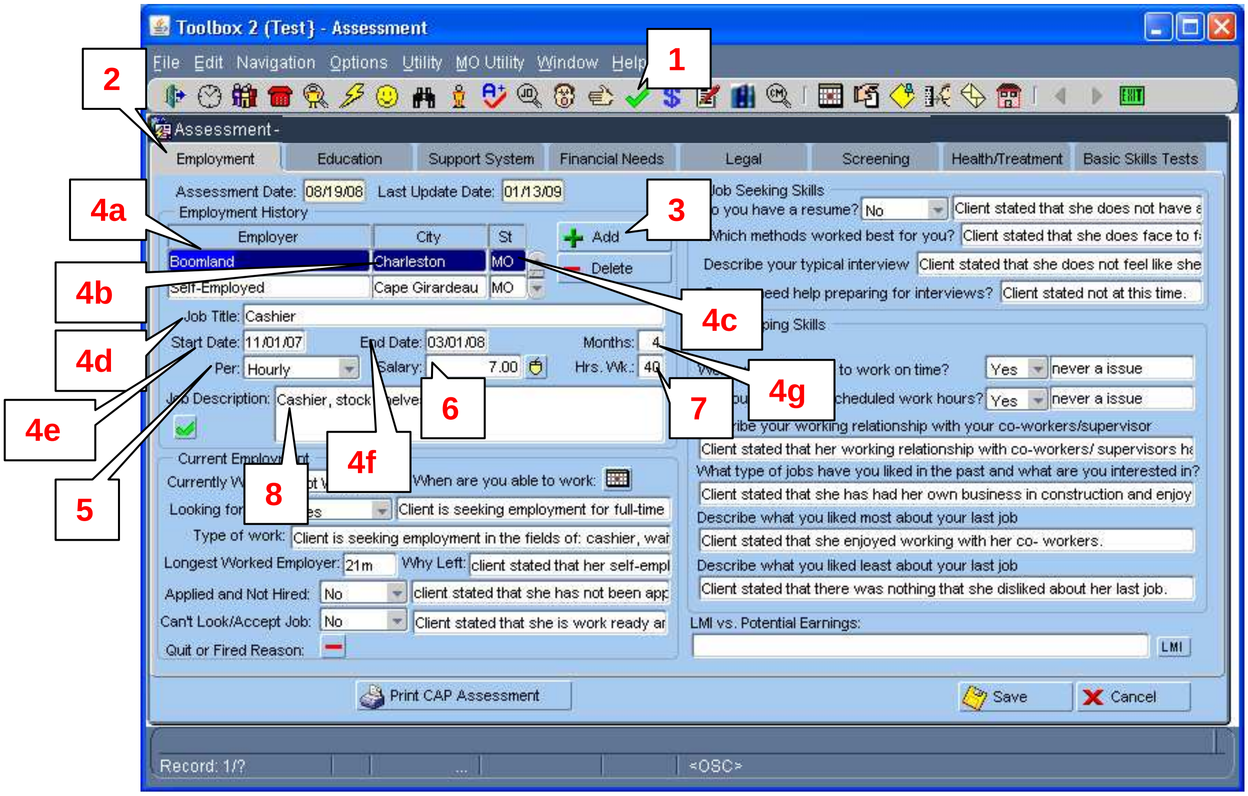


Figure 1: Assessment Module/Employment Tab

Step-by-Step:

1. Click on **Assessment** icon.
2. Click on the **Employment** tab.
3. Click on the Add button.
4. Complete the fields of:
    a. **Employer**,
    b. **City**,
    c. **St** (State),
    d. **Job Title**,
    e. **Start Date** (mm/dd/yy format), and
    f. **End Date** (mm/dd/yy format).
    g. The **Months** field will auto calculate based on the ‘Start Date’ and ‘End Date’.
5. In the **Per** field, type the pay frequency (daily, hourly, monthly, weekly, and yearly).
6. In the **Salary** field, type the amount of pay based on the frequency indicated in the **Per** field.
7. Complete the **Hrs. Wk** (Hours per Week) field.
8. Complete the **Job Description** field.

Verifying a Work History

Entering verification of employment to send the 'Employment Obtained' alert to FSD.

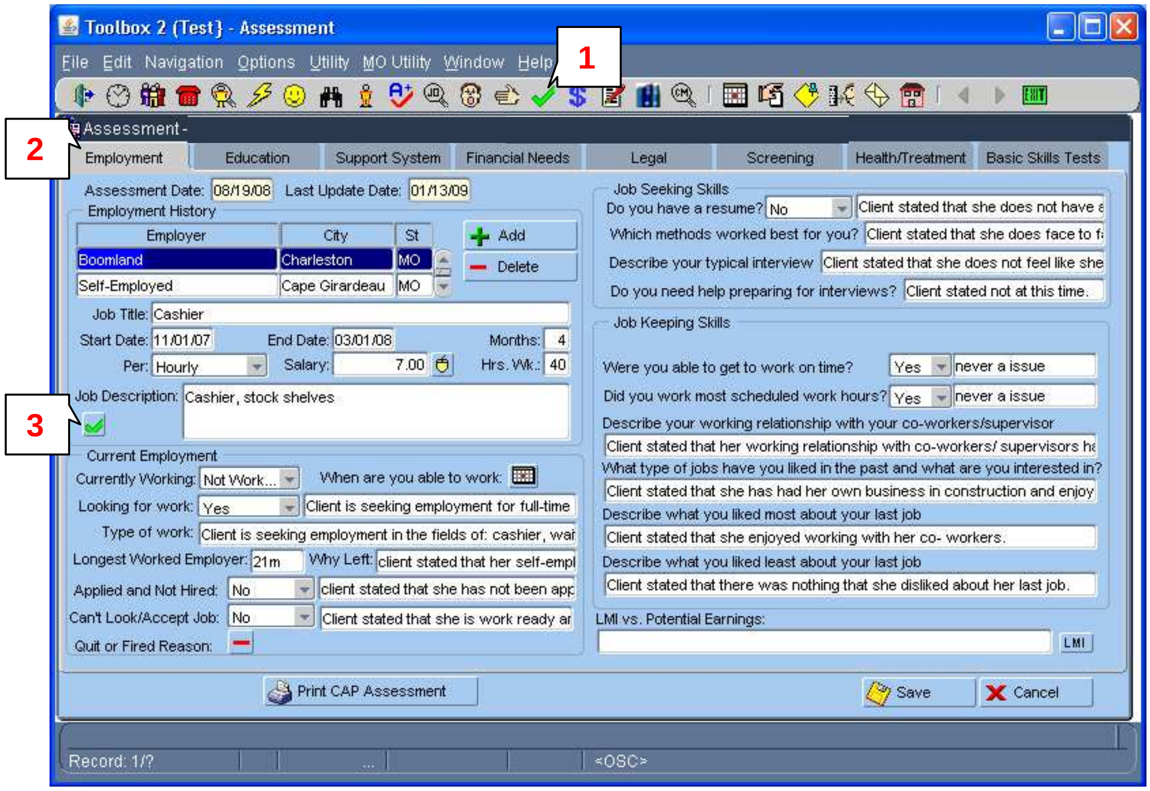


Figure 1: Assessment Module/Employment Tab

Step-by-Step:

1. Click on ✓ **Assessment** icon.
2. Click on the **Employment** tab.
3. Click on the ✓ button .

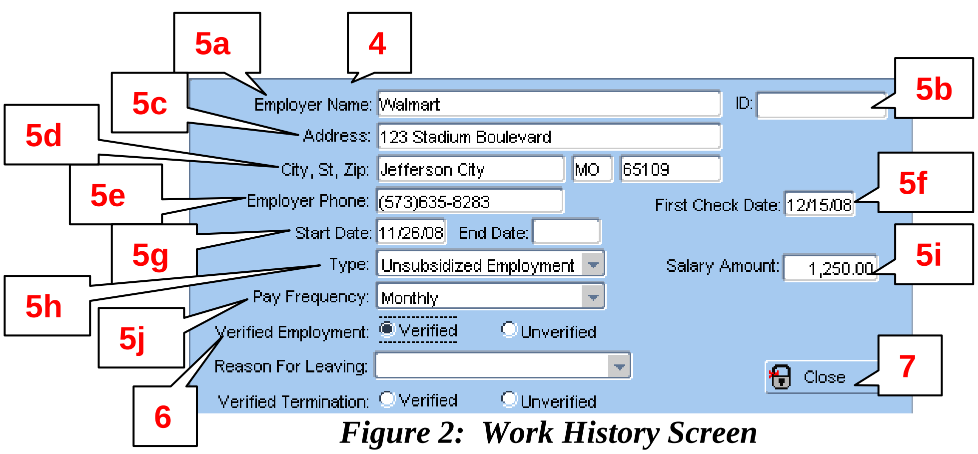


Figure 2: Work History Screen

4. The **Work History** screen will display.
5. If not already complete, enter information into the fields of:
    a. **Employer Name**,
    b. **ID** (if information is available),
    c. **Address**,
    d. **City-St-Zip**,
    e. **Employer Phone**,
    f. **First Check Date**,

g. **Start Date**,
h. **Type** (Subsidized, Unsubsidized Employment, OJT, Work Study, Americorp/Vista Stipend, Tips or Bonus, Compensation in Lieu of Wages, Self Employment, or Commission),
i. **Salary Amount**, and/or
j. **Pay Frequency** (Bi-Monthly, Bi-Weekly, Monthly, Semi-Monthly and Weekly).

6. For the field of **Verified Employment**, either <u>Verified</u> or <u>Unverified</u> must be selected.
7. Click on the 

button to send the alert.

Terminating a Work History

Entering termination of employment to send the 'Verification of Termination' alert to FSD.

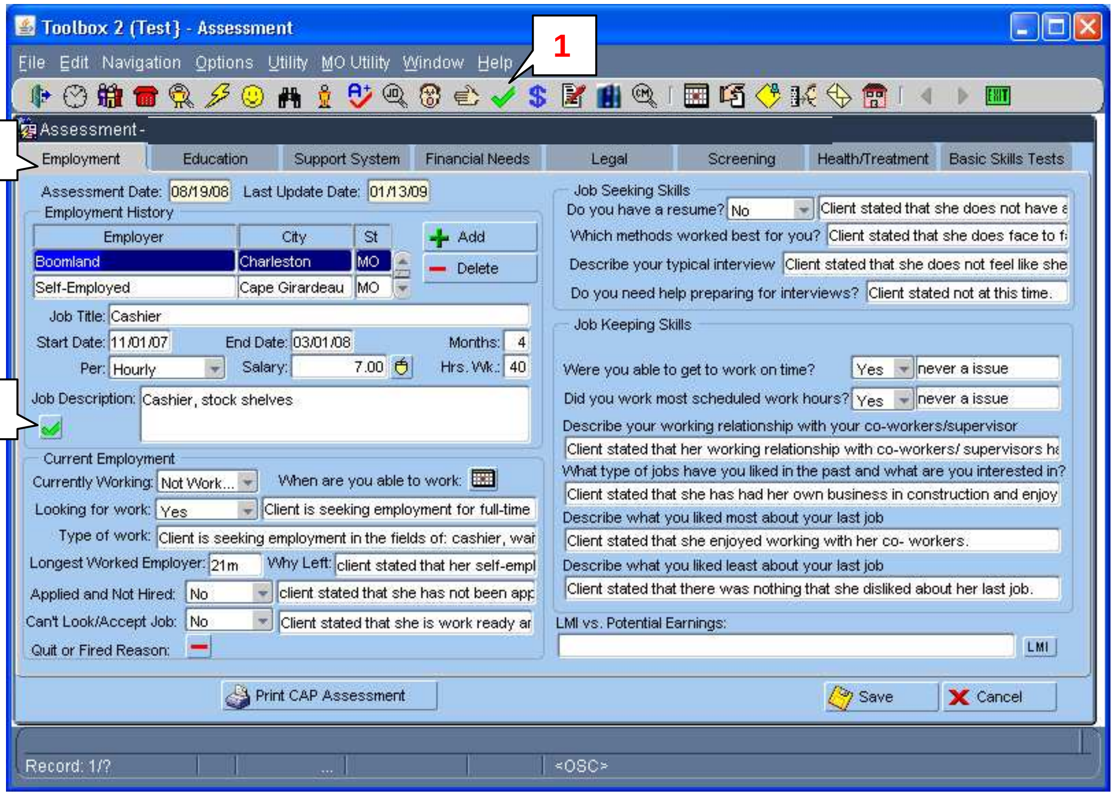


Figure 1: Assessment Module/Employment Tab

Step-by-Step:

1. Click on **Assessment** icon.
2. Click on the **Employment** tab.
3. Click on the button to access the **Work History** screen.

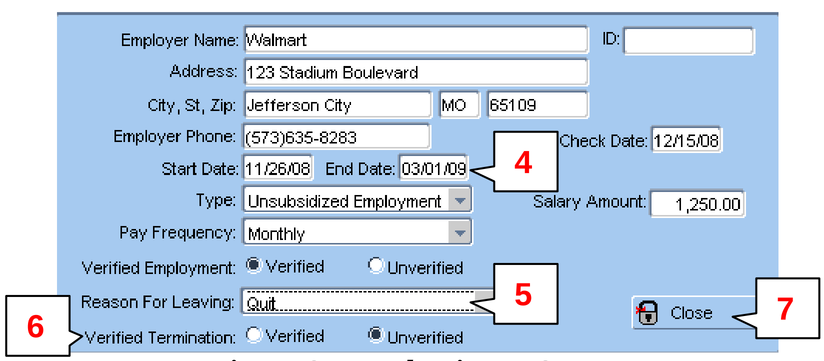


Figure 2: Work History Screen

4. Complete the **End Date** field.
5. For the **Reason for Leaving** (Layoff, Quit, Fired, Job Ended, or Other) field, select the reason for the termination of employment from the drop down menu.
6. In the **Verified Termination** field, select either <u>Verified</u> or <u>Unverified</u>.
7. Click on the Close button to send the alert.

Work Related Expense (WRE) Payments

Authorizing Work Related Expense (WRE) payments for recipients.

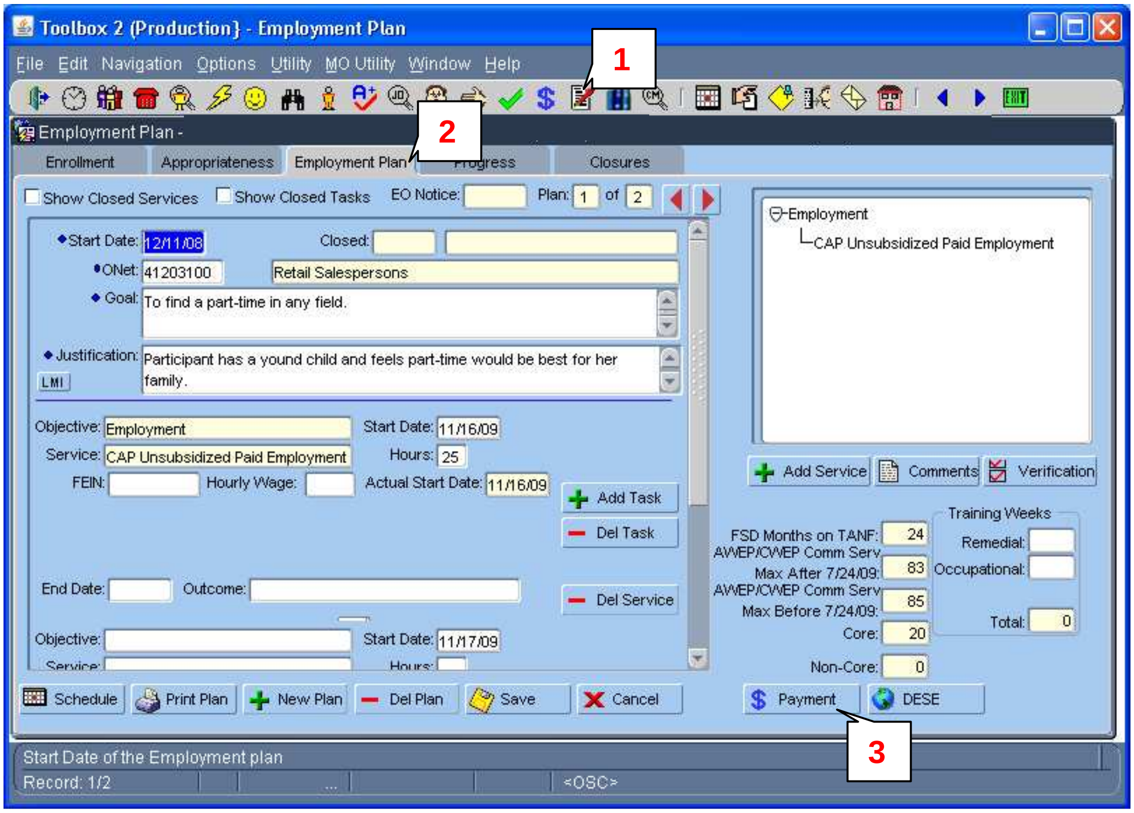


Figure 1: Employment Plan-Enrollment Module/Employment Plan Tab

Step-by-Step:

1. Click on **Employment Plan/Enrollment** icon.
2. Click on the **Employment Plan** tab.
3. Click the Payment button to access the Payments screen.

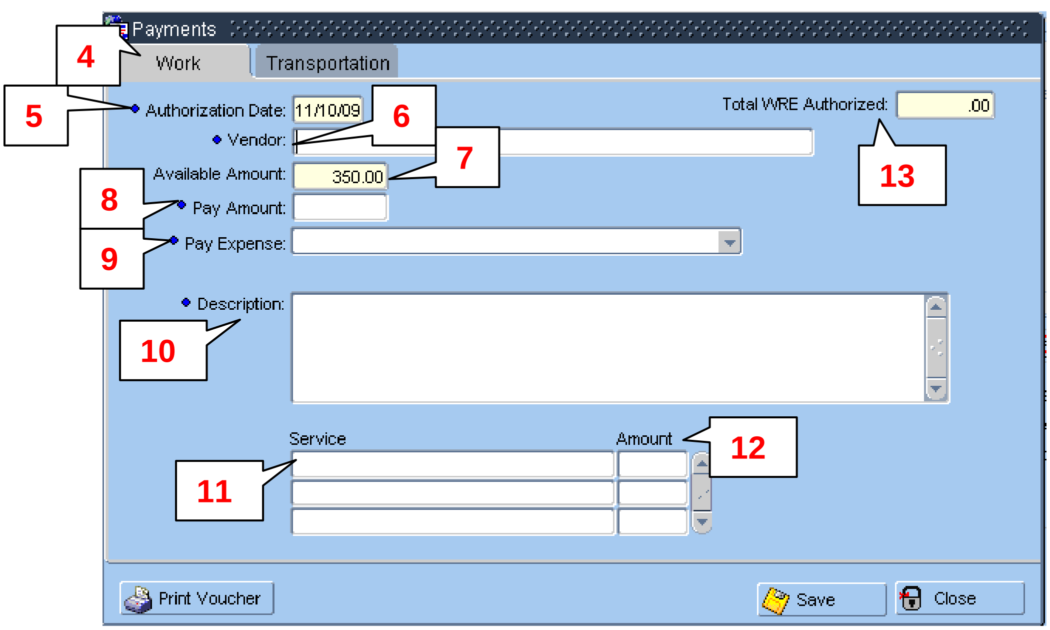


Figure 2: Payments Screen/Work Tab

4. The **Work** tab will display.
5. The **Authorization Date** will default to the current date.
6. Select the appropriate vendor by double clicking or pressing the F2 key while in the **Vendor** field for a list of options.
7. The **Available Amount** field displays the remaining amount of WRE available for the recipient. [The maximum amount of WRE is $350 per rolling 12-month period.]
8. In the **Pay Amount** field, enter the amount of WRE to be issued to the recipient.
9. From the drop down menu in the **Pay Expense** field, select the type of expense the WRE is covering.
10. In the **Description** field, enter a description of the WRE payment.
11. Double click in the **Service** field(s) to access a list of CAP services available to link to the WRE payment. [This function is not fully developed and its completion is optional.]
12. Enter the amount of the WRE associated with the service into the **Amount** field. [This function is not fully developed and its completion is optional.]
13. The **Total WRE Authorized** field indicates the total amount of WRE issued to the recipient in the past 12 months. The maximum amount of WRE is $350 for the previous 12-month period. Therefore, Toolbox 2.0 looks at the previous 12 months to determine the funding available.

    For example, it is September 15, 2009. Toolbox 2.0 will look to see what WRE payments were issued between September 15, 2008 – September 15, 2009 to calculate the available balance. If the following payment were issued: 9/25/08 - $100 and 8/15/09 - $50, there is $200 available on 9/15/09. [The maximum WRE that can be issued per 12 month period is $350. In this example, the client started with a $350 balance. The $100 and $50 payment would both be deducted and leave a balance of $200. However, on September 25, 2009, the $100 from the 9/25/08 payment would again be available to make the balance of WRE available $300.]

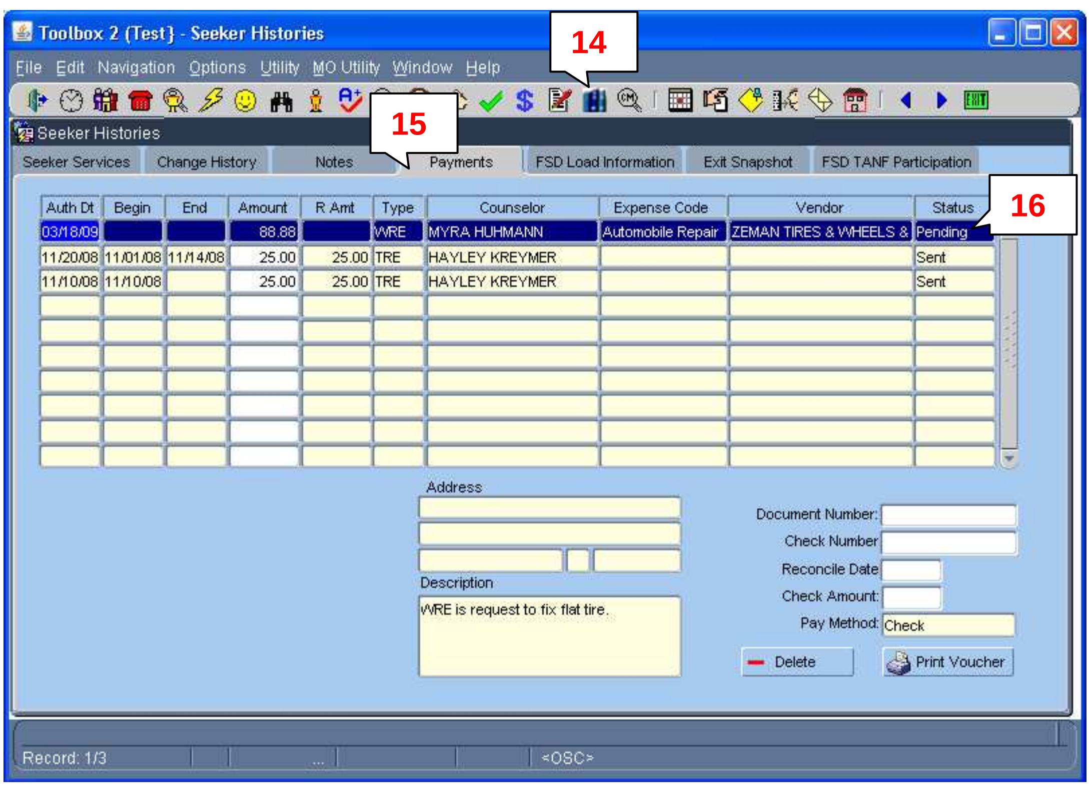


Figure 3: Seeker History Module/Payments Tab

14. To verify the payment was issued, click the **Seeker History** icon

15. Click on the **Payments** tab.
16. The **Status** will remain ‘Pending’ until WRE payments are reconciled.

Reconciling Payments

Reconciling WRE payments. Only users with authorized permissions my perform this functionality.

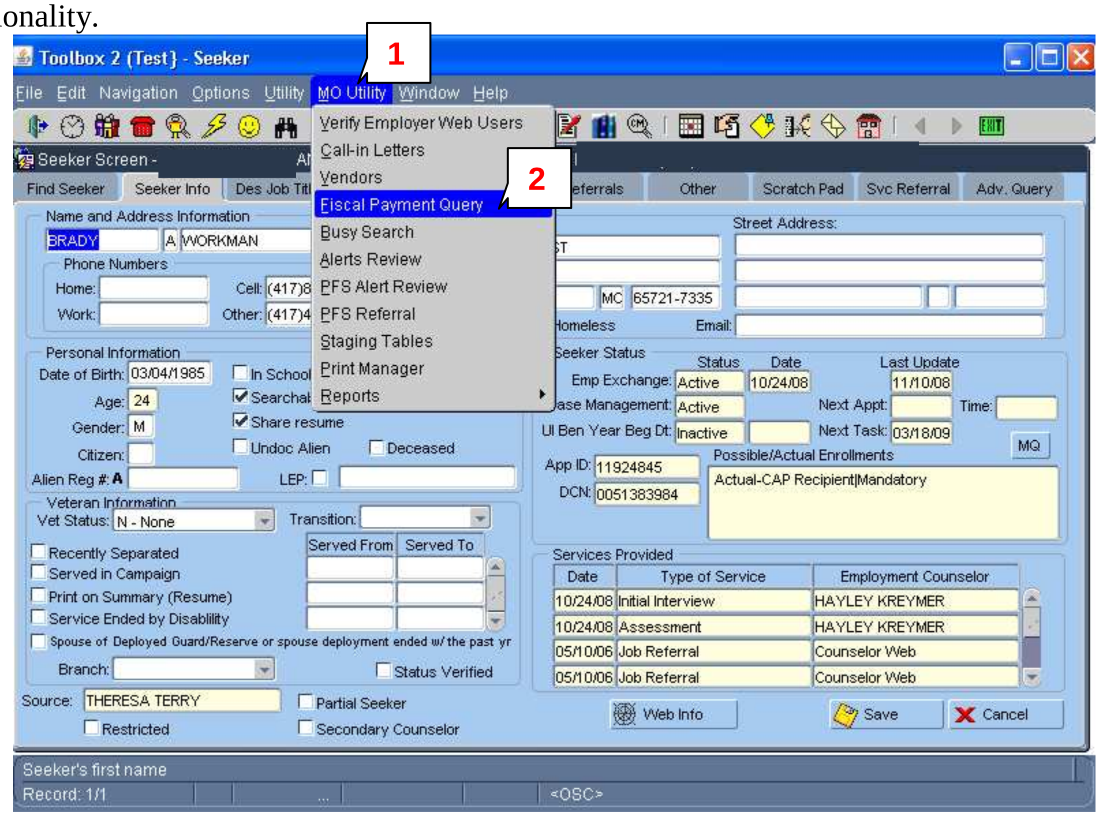


Figure 1: MO Utility Menu/Fiscal Payment Query Option

Step-by-Step:

1. Click on the  **MO Utility** menu.
2. Select the **Fiscal Payment Query**.

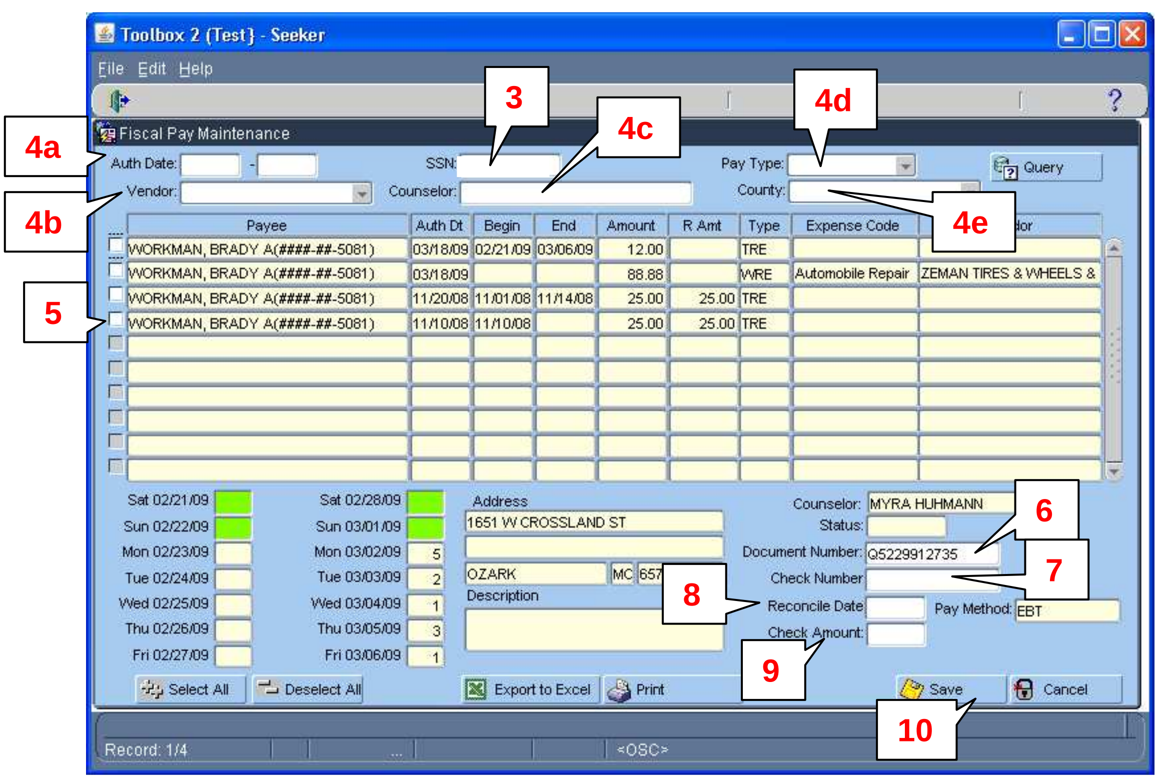


Figure 2: Fiscal Pay Maintenance

3. Use the **SSN** field to locate a specific record.
4. If you are reconciling multiple records, you can also use the fields of:
    a. **Auth Date**,
    b. **Vendor**,
    c. **Counselor**,
    d. **Pay Type**, and/or
    e. **County**.
5. From the list of payments, highlight the payment you want to reconcile.
6. Complete the **Document Number** field.
7. Complete the **Check Number** field.
8. Enter the appropriate date into the **Reconcile Date** field.
9. In the **Check Amount** field, enter the actual amount of payment issued to pay for the WRE.
10. Click the 

button.